



Global Headquarters
331 South Patrick Street
Alexandria, VA 22314 USA
+1.703.647.4900 Tel
+1.703.647.4901 Fax
www.sla.org

TO: SLA Board of Directors
FROM: SLA Board of Directors
DATE: July 10, 2015
RE: Board-Revised Recommendations

BACKGROUND INFORMATION: This report was originally submitted to the SLA Board of Directors on 30 April 2015 by de Stricker Associates and Shamel Information Services. Following a strategy session on 12 June 2015, the board made revisions to the report, which are indicated in red. The board then developed the "Road Map for the Future of SLA" ([OM0715-A02](#)) to guide the board, SLA staff, and SLA members in implementing these recommendations and other recommendations proposed by SLA members and units. The board will vote whether to receive these recommendations at its meeting on 14 July 2015.

Recommendation: That the Board of Directors vote to receive the document titled "Board-Revised Recommendations." (Receiving the report means the board has read the report and acknowledges the work done, but has not taken any action on it.)

Board-Revised Recommendations

Board of Directors
Special Libraries Association
July 14, 2015

Contents

[1. Executive Summary](#)

[2. Project Requirements and Process](#)

[2.1 Project Charge](#)

[2.2 Project Process](#)

[2.3 Immediate Concerns](#)

[3. Area I: Market Viability](#)

[3.1 Recommendations for SLA's Market Viability](#)

[3.2 Benefits and Drivers](#)

[3.3 Comparison with Other Information Professional Associations](#)

[4. Area II: Business Partnerships](#)

[4.1 Recommendations for SLA's Business Partner Policy](#)

[4.2 Benefits and Drivers](#)

[5. Area III: New Products and Services](#)

[5.1 Recommendations for SLA's Products and Services](#)

[5.2 Benefits and Drivers](#)

[6. Area IV: Conference Models](#)

[6.1 Recommendations for SLA's Future Conference Model](#)

[6.2 Benefits and Drivers](#)

[7. Area V: Organizational Review](#)

[7.1 Recommendations for SLA's Organization](#)

[7.2 Benefits and Drivers](#)

[8. Area VI: Revenue Model and Financial Review](#)

[8.1 Options for Securing Funds from SLA's Legal Assets](#)

[8.2 Recommendations for Revenue](#)

[8.3 Recommendations for Spending](#)

[8.4 Recommendations for Financial Management Process](#)

[8.5 Benefits and Drivers](#)

[9. Area VII: Membership Levels](#)

[9.1 Recommendations for SLA's Membership Policy](#)

[9.2 Recommendations for SLA's Membership Development](#)

[9.3 Benefits and Drivers](#)

[10. Impact on Bylaws and Statements of Policies and Practices](#)

1. Executive Summary

Over the last several years, **SLA has** marked the trend in declining membership and declining revenues and has responded with significant cuts in expenses, conservative budgeting, and a decision to free up funds by selling the headquarters building. Nevertheless, SLA continues to face serious financial challenges. In response, the Board engaged change consultants to provide strategic direction for the future of SLA.

According to the original Request for Information (RFI) document issued in **October** 2014, the consultants were charged with developing practical recommendations for change related to **market viability, business partner relationships, products and services, conference models, organizational structure, revenues and finances, and membership levels**. As expected, it soon became apparent that each area is inextricably linked to the others, making for some complexity in building the scenarios that were used to select the recommendations set out below.

The consultants reviewed nearly 100 existing committee and task force reports, surveys, recent statistics from conferences and membership reports, minutes, and budget documents (see Section 2.2). The consultants supplemented that information through multiple **lengthy** interviews with headquarters staff and **through exchanges with SLA** members. The available background of information was assessed in light of known challenges - challenges also affecting other professional associations - and in light of the objective of putting SLA on a sustainable forward path.

During the work of drafting and evaluating potential scenarios, the consultants arrived at a framework definition of "what SLA is all about" that is formulated slightly differently than it was in 1909 when SLA was founded. That framework definition drives the recommendations and **therefore** SLA's activities and success for decades to come. It states:

SLA is *the* association for information professionals seeking to be the best they can be in their careers and striving to advance the goals of the organizations they serve. SLA equips members to succeed, lead, and advance.

In other words, SLA is not defined by the places its members work or by the kinds of work its members undertake (those places and types of work will in any case keep evolving and changing over time). Rather, SLA is defined by a shared engagement in professional excellence. Such an *engagement focused* and *excellence focused* definition will stand the test of time and differentiates SLA from other associations.

It is therefore proposed that SLA be associated with and use wherever appropriate these action words: ***Succeed. Lead. Advance.***

It is key to the recommendations that they build on what works well and add new practices to replace past ones that have lost their value. Such a practice is well established. Peter Drucker often referred to the concept of "systematic abandonment of the obsolete, the unproductive, the no longer appropriate" (see e.g. page 522 of *Management*, Rev. Ed. NY: Collins, 1973).

As the Transition Committee knew in late 2014, taking no significant action as 2016 arrives would be tantamount to consigning SLA to dissolution, the only unknown being the precise number of months before such dissolution would occur as SLA became non-viable.

Each grouping of recommendations set out in this report is structured to articulate **what SLA's Board of Directors, staff, and volunteer leaders can do** in order to make and keep SLA a vibrant, valuable, and indispensable professional "home" for its members.

The Board is not encouraged to select from the recommendations as available evidence shows that it would make them difficult to implement. All charge areas relate to each other, and removing or diluting individual area strategies may unravel the cohesion of the overall strategy.

The scope of the recommendations points to a phased implementation, starting with the creation of an implementation plan.

For the sake of overview, the key challenges and the corresponding key strategies are set out below. The full set of recommendations - *and their benefits and drivers* - are provided in the body of the report.

Area I: Market Viability

Challenge: SLA's greatest challenge in the area of market viability has been its inability to define and serve its target market.

Key Strategy: Define SLA as *the* association for information professionals seeking to be the best they can be in their careers and striving to advance the goals of the organizations they serve. Within that framework, SLA can then develop the appropriate products, promotions, and pricing to serve the market niche.

Resulting Benefits: This definition puts SLA in the position to deliver unique value and benefit to individuals from a wide range of work environments and job responsibilities with a laser like focus on professional development and collaboration. Whether we call ourselves librarians or work in libraries becomes moot. When making product or services decisions, we ask "does X help our members advance their careers and deliver value?" When promoting the benefits of SLA, we communicate the clear benefit of membership and the difference between SLA and other associations. We can be confident in value based pricing for our high-performing members - no more worrying about members' willingness to pay.

Area II: Business Partnerships

Challenge: SLA's greatest challenge in the area of business partnerships has been its inability to engage in truly *mutually beneficial* relationships.

Key Strategy: **Build on the** understanding that vendors are valued partners in SLA's mission to assist members in being the best they can be professionally.

Resulting Benefit: In establishing true collaborative relationships with industry partners, SLA members will benefit from leveraged resources and business partners will realize enhanced access to their customer base.

Area III: New Products and Services

Challenge: SLA's greatest challenge in the area of products and services has been its inability to invest in a targeted array of highly valued benefits.

Key Strategy: By concentrating efforts on concrete offerings to advance SLA members' skills and careers, SLA will be able to solidify its market position as "the place to go to advance your career" and to reinforce the value proposition that "SLA is where you come to learn and grow". Products and services should focus on what we know to be the key value members need and want: High quality professional development content and networking opportunities.

Resulting Benefits: SLA gathers to itself members who care about enhancing their skills and who will pay for the opportunity to do so.

Area IV: Conference Models

Challenge: SLA's greatest challenge in the area of conferences is the historic dependency on divisions to determine conference content.

Key Strategy: SLA's annual conference should be a unifying highlight for members, one that clearly justifies the registration fee. Its professional development content and networking

opportunities should be collaboratively planned by staff and key stakeholders.

Resulting Benefits: Directing resources to the annual conference serves to enhance its status as the must-attend event. Carefully structured content designed to meet member needs and delivered in a manner suitable for adult learners will emphasize quality over quantity and better equip members to succeed in their careers and serve their organizations.

Area V: Organizational Review

Challenge: SLA's greatest challenges in the area of its organization are the composition and governing strength of the Board of Directors and the bureaucratic weight of unit management.

Key Strategy: (1) Construct SLA as *one* association rather than 80+ individual units acting independently, sometimes at cross purposes with each other and with the association overall. (2) Concentrate volunteer efforts on the strategic priority of developing and delivering high quality professional development, networking, and collaboration rather than on the administration of unit operations.

Resulting Benefits: If all the spectacular energy offered by SLA volunteers were directed toward educational offerings, community building, and networking opportunities, the value proposition of SLA would dramatically increase.

Area VI: Revenue Model and Financial Review

Challenge: SLA's greatest challenges in the area of revenues and financial management have been its reliance on dues and conference to fund the organization.

Key Strategy: The overall strategy for revenue models and financial management calls for establishing a competitive and value based dues structure, diversifying revenue streams, and tightening financial oversight.

Resulting Benefits: In an environment where the association has a clear, unique, and competitive position in the marketplace, it becomes much easier to communicate the value proposition. SLA understands who is served and why, while members, prospective members, and industry partners understand the benefit of engaging with SLA. This foundation provides clarity in terms of appropriate and defensible dues structures, conference fees, product and services offerings, and product pricing.

Area VII: Membership Levels

Challenge: SLA's greatest challenge in the area of membership levels has been the inability to support strategic recruitment efforts and the lack of tools for understanding member dynamics and demographics.

Key Strategy: SLA does not exist to *have* members. It exists to *deliver value to* members. Therefore, the intention of the plans and recommendations of this report is to create products and services that deliver value to the target market of information professionals, thus creating an organization to which members will want to belong.

Resulting Benefits: In this environment, the membership levels will calibrate accordingly. Some information industry associations in the marketplace have large memberships. As a consequence of clearly differentiating its market position and offering appropriate products and services, SLA has a better likelihood of achieving healthy and sustainable membership numbers. SLA has value to offer to members who perceive the value and are willing to pay for it.

2. Project Requirements and Process

2.1 Project Charge

As it was described in the *Request for Information* document issued by the Transition Committee in October 2014, SLA required guidance in turning from a path of likely demise into one of promise. At the Leadership Summit meeting in January 2015, information was provided to attendees regarding the background for the project; that information was subsequently shared with the membership through announcements on the SLA website and through messages on the Leadership and Governance discussion lists.

The Request for Information (RFI) document, **also shared with the membership**, set out eight areas of concern that were later reconfigured to seven in order to combine two very closely related topics. The consultants were tasked to examine those seven areas of SLA's operations and to develop recommendations in each.

2.2 Project Process

A time frame of one year (2015) and an envelope of a total of 150 work days were provided for the work. The work proceeded as follows:

The Board of Directors in January 2015 invited all members to submit comments to the consultants using a special email address. The invitation was widely broadcast.

Given the large amount of evidence on hand and the need for moving ahead quickly, the Board and the consultants agreed to use the existing evidence as a foundation for assessing strategic options. The sources studied included but were not limited to:

- **Policies, procedures, guidelines, and practices shown on governance and related areas of the SLA website, including:**
 - **SLA , SLA Strategic Priorities (2015-2016). Available: <https://www.sla.org/about-sla/strategic-plan/sla-strategic-priorities-2015-2016/> [4 July 2015].**
 - **SLA , Strategic Plan. Available: <http://www.sla.org/about-sla/strategic-plan/> [4 July 2015].**
 - **SLA , Vision, mission and value statements. Available: <http://www.sla.org/about-sla/vision-mission-core-value/> [4 July 2015]**
- **Results from the 2014 membership survey and recent annual event feedback results: Association Research, Inc. April 2014, 2014 Membership Survey Report conducted for SLA**
- **The last several years of board minutes and related board documents, including: SLA Competencies Task Force June 2014, *2014 Revised Competencies report, OM0614-A01.***
- **Budget documents, 990 filings, pooled income fund documents, Finance Committee reports and projections, attendance in January-April 2015 Finance Committee meetings and past meeting minutes, including: SLA , Association finances various reports. Available: <http://www.sla.org/about-sla/association-finances/> [4 July 2015].**
- **Membership statistics and projections**
- **Member Preferences report and all of its supporting documents including:**
 - **SLA Member Preferences Task Force October, 2014, Preliminary Report. EM1014-B02.**
 - **SLA Member Preferences Task Force January 2015, Final Report - amended, OM0115-A02.**

- Conference Re-envisioning Task Force Report:
 - SLA Conference Re-envisioning Task Force January 2014, Final Report.
 - SLA Conference Re-envisioning Task Force 2014, Final Report.
- Findings from Alignment project and loyalty initiative as well as other recent studies and materials, including:
 - Financial Times in conjunction with SLA November 2013, The Evolving Value of Information Management and the Five Essential Attributes of the Modern Information Professional.
 - Bates, Mary-Ellen & Blankson-Hemans, Liz July 2012, Richer Volunteer Experience Project Update, EM0712-B04.
 - Kane, J. 2012, Loyalty Field Guide: A Primer for SLA Chapters and Divisions.
 - SLA, Align SLA! resources.
Available: <http://hq.sla.org/content/SLA/alignment/portal/index.html> [4 July 2015].
- Input from the chairs of several councils and committees, including the Committee on Association Governance, Finance Committee, and the Professional Development Advisory Council
- Past records of unit/conference sponsorships; unit reporting documents
- Meetings and correspondence with SLA staff
- Input from members submitted via interim@sla.org, directly and/or during Leadership Summit
- Association management related literature such as materials from the American Society of Association Executives and several books on association management, including:
 - *7 Measures of Success: What Remarkable Associations Do that Others Don't* Published by the American Society of Association Executives, 2006
 - *Race for Relevance: 5 Radical Changes for Associations* by Harrison Coerver and Mary Byers, ASAE, 2011
- Reports from similar associations such as the Velvet Chainsaw Consulting October 2011, Observations and Recommendations: American Association of Law Libraries.

In January 2015, the consultants attended Leadership Summit and had ample opportunity to receive member input. In February and March, the consultants met with staff members in headquarters to obtain insight into the work being done throughout the "association year". The consultants reached out to members currently in charge of specific relevant initiatives. The consultants clarified and further specified the input required from staff (e.g. a technology plan and data related to conferences).

In April, the consultants concluded that it would be possible to compress the timeline for delivering project recommendations and advanced the submission date to May 1.

On May 15, the Board provided to all SLA members a copy of the consultants' recommendations report, inviting feedback by June 16 (that date was later extended to June 23).

The current report is the Board's document, reflecting refinements inspired by member feedback and resulting from extensive Board discussion.

2.3 Immediate Concerns

During the work performed in the January-April 2015 time period, the consultants identified some immediate concerns and alerted the Board to them on the basis of a judgment that they needed attention sooner rather than later.

Among them, the ***need for an upgrade to technology*** stands out as a requirement in need of urgent attention. The ability to provide key products and services - not to mention quality in user experience - hinges on the presence of up-to-date technology. The existing technology infrastructure is seriously outdated and inadequate as upgrades have not been funded for some years.

3. Area I: Market Viability

The overall finding is that SLA has failed to effectively define its position in the marketplace and thus does not have a framework in which to develop products, promotion, or pricing decisions. This has resulted in inconsistent messaging around value and benefits and lack of direction for staff in terms of product development.

It is generally accepted in the professional field of association management that members pay to belong when they perceive a unique and non-replicable benefit to themselves. Long gone are the days when belonging to the professional society was "something you just did".

A significant challenge in enticing members to join and stay is to demonstrate such unique and non-replicable advantage. In today's social media world, professionals have access to free resources ranging from local area meetups, LinkedIn groups, and Facebook communities to vendor webinars. The issue is not that other associations are better. It is that belonging to any association no longer seems essential.

Market viability hinges on where SLA fits in the scheme of an information professional's career plans, how it differentiates itself from other options for obtaining the benefits of networking, and what specific value it ***offers members through the products and services it decides to develop.***

The unique value proposition of SLA is the depth and breadth of expertise in technical subject matters as well as in leadership and management skills. In addition, SLA has something of value to offer to students, recent graduates, early career professionals, and members up through senior professionals.

The overall strategy is to define SLA as *the* association for information professionals seeking to be the best they can be in their careers and striving to advance the goals of the organizations they serve. Within that framework, SLA can then develop the appropriate products, promotions, and pricing to serve the market niche.

3.1 Recommendations for SLA's Market Viability

- At this point in time, SLA does not have the resources to engage in high impact advocacy for the information profession. ***Therefore, advocacy is not at this time included in SLA's mission or vision. Instead, we will equip members to advocate for themselves and the profession by gaining skills in demonstrating their value.***
- Define the target market as any information professional seeking to learn and grow in professionalism and competency and any business partner who seeks to participate in these endeavors.
- Develop products and services that support professional development, enable virtual and face to face networking opportunities, and offer strategic non-member access. SLA's primary product offering should be educational content, and its primary service offerings are networking opportunities and career advancement services.

- Position SLA's professional development offerings so that they deliver value to information professionals at all career stages covering **specialized** business, technical, and interpersonal skills.
- Price membership, events, products, and services to deliver benefit to members according to what the market will bear.
- Promote the value of SLA membership internally and externally through strategic messaging. This will require additional staff resources and expertise.
- Implement technology improvements to facilitate membership segment analysis **in order to focus strategically on member services.**

3.2 Benefits and Drivers

Board Charge: Regarding market viability and value perceptions, the RFI stated: "For reasons that are difficult to capture and quantify, there has been a change in the viability and value factors associated with SLA. This impacts many other factors such as membership, revenue levels, etc. This is a primary and critical concern that needs attention during the interim period."

The Challenge: SLA's greatest challenge in the area of market viability has been its inability to define and serve its target market.

Recommended Strategy: **A viable niche for SLA in the marketplace of associations for information professionals is created by defining SLA as being the place for individuals who care about their professionalism.**

Resulting Benefits: This definition puts SLA in the position to deliver unique value and benefit to individuals from a wide range of work environments and job responsibilities with a laser like focus on professional development and collaboration. Whether we call ourselves librarians or work in libraries becomes moot. When making product or services decisions, we ask "does X help our members advance their careers and deliver value?" When promoting the benefits of SLA, we communicate the clear benefit of membership and the difference between SLA and other associations. We can be confident in value based pricing for our high-performing members - no more worrying about members' willingness to pay.

3.2.a Market Description and Target Market

- SLA members value the agility of SLA and the opportunity to participate on committees and boards. This feature of SLA should be preserved. However, over time SLA has experienced an identity crisis, not knowing who its members are, what they value, and where they come from. As a result there has been a tendency to try to be all things to all people, leading to a lack of focus and inability to articulate a value proposition. The proposed market position for SLA - to focus on the **career minded information professional** - permits the association to simultaneously widen and narrow its focus. The comparison with other associations shown below confirms that other associations are not currently offering value according to this market position, leaving an opportunity for SLA.

The target market is widened in the sense that membership is not grounded in where you work, what you call yourself, or how or where you were educated. Membership is open and appropriate to those working to deliver information products or services **who are also interested** in professional excellence, being the best they can be, and delivering value to the organizations for which they work. Such a market focus will necessarily divert attention from initiatives to become more international, focus attention on one particular career stage or another, and advocate on behalf of the profession as a whole.

- Members have indicated that their most pressing professional concerns include lack of management awareness of information professionals' value, exclusion from management decisions, and the perception by clients that everything is free and easy to find on the Internet and social media. **It is recommended that,** rather than aspiring to be engaged in advocacy at this point in time, SLA equip members to advocate for themselves.

- Existing technology does not enable member segment analysis, trend analysis, or member tracking which would otherwise provide key input to strategic decision making.

3.2.b Differentiator and Value Proposition

- SLA's value proposition is the educational content for all stages of the information professional's career addressing the technical information skills appropriate to the job, business skills required to meet the needs of the organizations for which SLA members work, and the interpersonal skills that help all professionals succeed in the workplace.
- SLA's primary product offering should be educational content, and its primary service offerings should be networking opportunities and career advancement services.
- Members have stated that one of the reasons they belong to SLA over other professional associations is the opportunity to get involved through committee work and other volunteer activities and to develop communities that meet their needs (such as a caucus or division section). These can be leveraged, particularly with the implementation of **planned new software**, to promote the value proposition for SLA and define what makes it different from other organizations.

3.2.c Pricing

- Pricing SLA membership, products, and services requires additional study. A dues analysis is underway, and some recommendations are included elsewhere in this report. It is important that there be a clear definition of what products and services are available to members only and what can be offered (as samples or teasers) to non-members. Holding this line makes it easier to communicate the value of membership. Lowering fees does not always serve as a reduction in barriers to access. It can in fact serve to reduce the perceived value of the offering. Reducing the price for conference, membership, or other products and services does not guarantee increased revenues or participation.

3.2.d Promotion

- Current promotional messaging and channels for communicating SLA's value proposition to members and non-members are disorganized and ineffective. For instance, distributing key member information to the membership through the Leadership Discussion List derails the purpose of that list and leads to inconsistent and duplicative communication. Social media messaging is currently managed by volunteers in the absence of an adopted policy or unified strategy. Management of the SLA brand is fragmented, decentralized, and inconsistent. Resources must be applied to strategic, unified, and effective communication inside and outside the organization. That will require marketing communication plans, templates, and checklists to bring order, efficiency, and consistency to all promotional activities.
- In the absence of clear guidelines and expectations, units have the ability to create new communication channels through social media including Slideshare, Hackpad, Facebook, LinkedIn, Twitter, and other channels. Units allow non-members to participate in member channels, thus hijacking the brand, devaluing membership, and blurring the messaging.

3.3 Comparison with Other Information Professional Associations

The following table provides highlights of other associations SLA members and potential members could consider joining. As the shaded cells illustrate, the current **membership** fee is competitive as it is in line with those of other associations.

Overview of Associations Targeting Professionals in Related Disciplines

(information taken from the respective websites)

Organization	Dues	Member Number	Mission/Tag	Target Market	Products & Benefits	Differentiation
Chartered Inst. Of Library and Information Professionals	\$362	13,470	Promote and support the people who work to deliver literacy, access, and transfer of knowledge	Everyone with an interest in the library, information, and knowledge professions	Professional development, discounts, career coaching, advocacy, publications, networking, virtual learning - "professional registration" certifications	UK based - for "everyone" Deep program of certifications
Society of American Archivists	\$250	651 institutions 5,000 individuals	Enables archivists to achieve professional excellence and foster innovation	Archivists	Journal, newsletter, discounts, mentoring, sections and roundtables, membership directory; digital archives specialist certificate	Precise target market Certificate program
Am. Assn of Law Librarians	\$234	~5,000	Advances the profession of law librarianship and supports the professional growth of its members	Law librarians and related professionals	Leadership Academy Management Institute Conference; journal	Precise target market Robust training programs
Assn of Independent Information Professionals	\$200	400	Leading voice, essential resource for info entrepreneurs	All kinds of information professionals	Vendor discounts, training, conference, private discussion list	Specifically for business owners
Special Libraries Association	\$200 proposed	7,000 +	Promotes and strengthens its members through learning, advocacy, and networking initiatives	Specialized information professionals and their strategic partners	Variety of courses, webinars Annual Conference	Historical focus was corporate/govt librarians; more recently larger # of academic librarians
Medical Libraries Association	\$195	1,000 institutions 3,600 individuals	Fosters excellence in the professional achievement and leadership of members	Health sciences library and information professionals	Courses, on demand webinars, lots of CE, networking	Precise target market Robust training programs
Strategic Competitive Intelligence Professionals	\$195	nearly 3,000	Enhance the success of our members through leadership, education, advocacy, and networking	Everyone creating and managing business knowledge	training, directory, discounts, volunteerism, toolkits, exclusive research, industry certifications, webinars, career services, news, awards, networking	Broad target market includes non-info pros Robust training offerings

Organization	Dues	Member Number	Mission/Tag	Target Market	Products & Benefits	Differentiation
ARMA (records management)	\$175	27,000	Authority on governing information as a strategic asset	Info managers, archivists, corp librarians, imaging specialists, legal pros, IT managers	Information to help you grow; IGP Certification (handbook, application, test); PD courses	Target mkt includes para-professionals Certification programs
American Society for Indexing	\$175	n/a 510 on LinkedIn	Advocate, educate, and provide the central resource for indexing	Indexers	Annual conference, special interest groups, online training course in four modules, workshops and seminars	Precise target market
Assn for Information and Image Mgmt	\$169	80,000	Global community of information professionals	Leaders committed to information-driven innovation	11 resource learning centers; training, community, advice, mkt research	Very broad net including providers
Assn for Information Science and Technology	\$140	4,000	Stimulate participation and interaction for professional exchange	Focus on theories, techniques, and technologies to improve info access	Publications, meetings, symposia, webinars, discounts	Academic / scholarly approach to the profession
American Library Association	\$135	57,000+	Development, promotion, and improvement of lib and info services and the profession of librarianship	Librarians, library trustees, other interested parties in all kinds of libraries	Advocacy, accreditation, CE, standards	Large, bureaucratic, with focus on public librarians
Association of College and Research Libraries	\$135 plus \$60	12,000	Enhance ability of acad. info pros to serve info needs of higher ed. and improve learning, teaching, and research	Academic librarians	Standards; journal and news magazine; community; PD	A division of a larger organization

4. Area II: Business Partnerships

Business partners have traditionally been, and remain, a significant and highly valued participant in SLA's activities. SLA members rely on business partners for quality products and services in order to serve their constituencies, while business partners appreciate the access SLA provides to qualified buyers.

Several aspects of business partnerships are relevant to conference models, and the tradition of providing significant recognition to sponsors at the annual conference is worth continuing and enhancing.

4.1 Recommendations for SLA's Business Partner Policy

The strategic direction is to **build on the** understanding that vendors are valued partners in **SLA, and in** SLA's mission to assist members in being the best they can be professionally.

- **Streamline SLA's relationships with business partners for a consistent approach to** developing and nurturing the relationships, setting specific parameters and pricing, and coordinating unit initiatives involving business partners.
- **Create consistent transaction processes for** units' business partner relationships. Business partners may still choose to focus their financial support on specific units, sessions, or educational events when it is relevant. **Larger** financial transactions **may be** carried out at the association level.
- **Continue strong and successful business partner relationships and ensure collaboration between units and staff in order to pursue upselling opportunities.**
- **Foster a "sell for value, don't just recover cost" business approach in the context of units soliciting sponsorships.**
- Leverage business partners' expertise by inviting participation in the development of educational content. A business partner could, for example, donate the **knowledge** and time of an employee rather than donating money.
- Widen the range of options for business partners to consider in choosing how they wish to be rewarded and recognized for their financial support of conference. All arrangements should be mutually beneficial, addressing the needs of SLA as a whole, SLA's units, and the vendor's market niche.
- Provide for custom arrangements in cases where a vendor wishes to make a significant long term investment.
- Enhance the opportunities business partners have at the annual conference for meeting with qualified buyers. For example, a booth being passed by indifferent traffic may not be attractive while a separate area set aside for client discussions may be more suitable.
- Launch a social media communications campaign, repeated annually, to educate SLA members as to the value of business partner support (e.g. "with the support of X, SLA members are able to benefit from Y").
- **Stress to** SLA members that business partners are valuable and valid contributors to professional development and deserve a "seat at the table" when SLA plans educational events.

4.2 Benefits and Drivers

Board Charge: The Request for Information (RFI) document stated that SLA needs to explore opportunities for relationships with appropriate entities "as business partners for business and product development, joint ventures and other financial relationships".

The Challenge: SLA's greatest challenge in the area of business partnerships has been its inability to engage in truly *mutually beneficial* relationships.

Recommended Strategy: Such a goal should be seen in the light of "what SLA is all about". Before SLA can enter into joint ventures, there is a need to define precisely what SLA is and position it in the marketplace to clarify its value proposition. As a cohesive community coalesced around a common core value - professional excellence - SLA will be in a better position to offer new and existing partners attractive opportunities for collaborative projects.

Resulting Benefits: Such a longer term strategy does not preclude enhancing relationships with existing business partners by boosting the benefits offered to them and by making the traditional sponsorship arrangements more effective. In establishing true collaborative relationships with industry partners, SLA members will benefit from leveraged resources and business partners will realize enhanced access to their customer base.

The primary concern is to forge close and strong collaborative relationships with relevant entities to assist SLA in meeting the educational needs of members and to assist members in meeting the needs of their organizations. The recommendations are expected to produce the following beneficial results:

- Vendors will be relieved from having to deal with multiple units' requests for various types of ad hoc support and will be able to plan their investments in the SLA marketplace for a long term strategy.
- A flexible set of benefits options geared to the specific needs of business partners will contribute to their long term loyalty.
- A collaborative management approach ensures that benefits flowing to SLA from the business partner relationships are appropriately allocated and invested.
- Business partners **are** in a position to contribute their considerable intellectual value to SLA in terms of quality content. They **are** a key resource in developing new products and services.

Key among the drivers for the recommendations are the following:

- Industry mergers are culling the ranks of large companies traditionally purchasing major booths at conference.
- Divisions have important business partner relationships with vendors unique to the topic, but those relationships may in the end dilute the overall mutual benefit.
- Ad hoc initiatives may not deliver the maximum benefit when they are isolated from an overall policy of beneficial arrangements.
- There is a perception on the part of some SLA members that business partners' financial support is welcome but that they are to be restricted from e.g. speaking at events (because of the risk of a "sales pitch"). Such a perception leads to unnecessarily restrictive unit policies as to e.g. how a business partner may interact with attendees at an event.

These drivers have been recognized for several years. The Conference Re-envisioning Task Force's (CRTF) work in 2013 included a detailed look at the relationship with business partners. Key elements of the CRTF's conclusions are shown here for context. They remain valid and have been confirmed by subsequent input from staff members interacting with business partners and exhibitors. (Note: One of the consultants chaired the Business Partner Subgroup of the CRTF and quotes from her report below.)

► **SWOT: How Attractive is SLA to Business Partners? (From the CRTF Final Report)**

Strengths	Weaknesses
<ul style="list-style-type: none"> • A tradition of strong relationships and loyal business partners traditionally sponsoring SLA events • SLA's ability to target customers (e.g. division segments) • SLA's good will and image as a flexible business partner 	<ul style="list-style-type: none"> • Business partners perceive they will sell as much without exhibiting (key buyers know them regardless) • Business partners see exhibit goers as non-buyers • Business partners therefore sending junior staff, not impressing senior buyers who come to booths • Current model is no longer working (exhibit rules, decentralized process for session sponsorships, etc.) • SLA's Divisions model forces competition among units and SLA as a whole • Insufficient avenues to engage business partners for a win/win ongoing relationship beyond conference (need new models beyond the ones used in the past)
Opportunities	Threats
<ul style="list-style-type: none"> • Social media avenues e.g. webinars by business partners (topical and product based) • Featuring business partners more prominently at conference sessions • Co-producing educational content and events • Involving business partners in all aspects of conference 	<ul style="list-style-type: none"> • Business partners adopting sales strategies not involving SLA exhibits • Business partners abandoning SLA altogether and addressing customers via other channels

► Recommendations from the Conference Re-envisioning Task Force in 2013

The excerpt shown below from CRTF's final report illustrates the significant takeaways from its work.

- Develop a "Business Partner Relationship Charter" to spell out the philosophy guiding SLA's desire to engage business partners in productive and mutually beneficial relationships and activities. The key themes in such a charter would be the optimal ROI for business partner investment and the optimal benefits for SLA members. The charter would set out - but not thereby limit - the ways in which business partners and SLA might collaborate for mutual advantage. (As an example, non-exhibitor business partners might still be recognized at the conference if they sponsor an event.)
- Recognizing the valuable knowledge business partners are able to share, enhance business partners' opportunities to become part of the intellectual content of the conference and of unit events throughout the year. Designate a specific type of business partner-led educational event in distinction from product specific overviews. Work with business partners to offer joint educational opportunities year round.
- Configure the conference exhibit hall in new ways in order to boost traffic (for example, by grouping business partners according to member subject interests) and make the exhibit hall the "social hub" for the conference by e.g. including seating and facilitating healthy food offerings. Include space for business partners to meet with clients.
- Provide much more unopposed time for members to visit with exhibitors.
- Generate more publicity for exhibitors by holding and promoting on social media such events as contests for most understandable booth text (as an example).
- Assist business partners by offering them the opportunity to broadcast webinars to members throughout the year and ensure it is communicated to members that SLA undertakes such a program in order to enhance members' opportunity for professional development.
- Communicate to SLA members why it's fair to facilitate business partner access to membership information, and assist business partners in reaching out to members. (An opt-out function could allow those members not wishing to be contacted to so indicate.)
- Create a "one stop shop" connection for business partners so that, if desired, business partners may interact with one person or committee and direct how sponsorship funds are to be spent. (Business partners opting for such a model may thus be spared the need to deal with requests from multiple units.)
- Create a "menu matrix" of exposures associated with levels of financial support to provide flexibility for all parties. The concept is well known: For X, the business partner may choose from among Y benefit options.
- Offer "exhibit hall etiquette" education to exhibitor staff.

5. Area III: New Products and Services

The area is closely related to that of Conference Models in terms of the *educational content* delivered. SLA's primary product offerings should be educational content, and SLA's primary service offerings should be networking opportunities and career advancement services.

Within the context of SLA being ***the association for information professionals seeking to be the best they can be in their careers and in striving to advance the goals of the organizations they serve***, educational products and services are naturally front and center. In addition, an increased focus on career support would be beneficial. Robust educational offerings are SLA's best bet for demonstrating value to current and potential members.

The specialized knowledge held in units is particularly valuable and should be leveraged as fully as possible. It is a key value proposition of SLA that it spans so many professional niches; a member may throughout his or her career in moving from niche to niche (e.g. from law to health to transportation) benefit from multiple subject specializations available in units. The overarching "family" of SLA serves as the glue holding the niches together.

Note that before NEW products and services can be conceived, developed, and rolled out, SLA's inadequate technology infrastructure must be addressed, as must the need for additional human resources to undertake the work.

5.1 Recommendations for SLA's Products and Services

Observation: Before SLA can enter into joint ventures, it must position itself clearly in the marketplace to clarify value proposition. Such a need does not preclude enhancing relationships with business partners.

By concentrating efforts on concrete offerings to advance SLA members' skills and careers, SLA will be able to solidify its market position as "the place to go to advance your career" and to reinforce the value proposition that "SLA is where you come to learn and grow". Products and services should focus on what we know to be the key value members need and want: High quality professional development content, **leadership skills growth, and networking opportunities.**

Professional development is the core of SLA. Educational content is the engine that will deliver it. Any content the association creates for its members will be **of high quality, easily findable, relevant, useful, and packaged in multiple ways to serve a variety of needs and audiences at a variety of fee levels**. A pipeline of emerging topics and new treatment of evergreen topics will keep the offerings fresh (funded by a separate budget line item). Educational offerings will support members in delivering value to their employers every day and thus to demonstrate why they are worth their pay. The following steps are recommended:

- Conceive SLA's educational offerings as a matrix of content and formats to meet SLA member requirements for here-and-now skill building (how-to) and longer term expertise enhancement.
- **Partner with units to create such offerings.**
- To the degree possible and feasible, repurpose existing content to leverage effort already invested **and leverage unit contributions, by sharing content and filling gaps.**
- Leverage all delivery channels and formats for coordinated, year-round delivery of professional development content through *Information Outlook*, social media, the SLA website, webinars, virtual leader training, and the annual conference.
- Engage a professional educational content manager with qualifications in adult education to work closely with conference planners so that educational offerings remain in sync with each other and evolve with the development of new technologies and workplace challenges.
- **Engage, through staff and unit collaboration, business partners and academic institutions as well as units in the development of educational content aligned within a coordinated curriculum that avoids duplication.**
- Build a "vault" of educational content (e.g. webinars, books, live conference session outlines, resource guides, white papers) from which SLA members may select. Array them in "topic tracks" (rather than according to format or media) so that SLA members may construct a personal **educational path**).
- Sunset Click University as a brand and roll certificate programs into the comprehensive range of professional development offerings.
- **Use the common calendar and add registration capability to facilitate members' use of offerings, and ensure that all members have knowledge of and access to material from all units.**
- Establish and manage a "career consultation service" offering one-on-one individualized advice and coaching by qualified individuals (professional career coaches or SLA members having demonstrated their ability in the area - for example, Fellows). Fee-based, the service would ideally be self-funding and generate a profit. Consulting as an association service and member benefit was demonstrated by the National Association for Printing Leadership in offering a fee based consulting service to its members in areas of specific need. For SLA members this could include career consultation, negotiation, or client management. At NAPL the consulting service has generated a significant revenue stream.

- Enhance the Career Center (and rename it "SLA Job Board" or something more clearly indicating what it is) and develop attractive corporate posting opportunities (e.g. a fixed annual price for designated numbers of postings). The service is popular and should be leveraged more fully.
- Link the Job Board to the Career Consultation offering.
- Develop and enhance networking opportunities both virtual and face to face, leveraging the member communities created through the units.
- Add a product development line item to the association budget in order to provide dedicated funding to creating and maintaining a pipeline of new products and services.

5.2 Benefits and Drivers

Board Charge: The RFI stated that SLA needs to "develop and offer new products and services that are relevant to current marketplace requirements and have perceived market value to members, potential members, and vendor partners" in order to generate revenue.

The Challenge: SLA's greatest challenge in the area of products and services has been its inability to invest in a targeted array of highly valued benefits.

Recommended Strategy: SLA positions itself as a lifelong career school for members and offers high quality educational opportunities.

Resulting Benefits: SLA gathers to itself members who care about enhancing their skills and who will pay for the opportunity to do so.

The following are key benefits to flow from the recommendations:

- As it is time to shed outdated perceptions of what SLA is all about, a focus on educational opportunities is the perfect strategy for repositioning the association as serious supplier of quality education.
- A panoply of educational offerings made available through multiple channels (documents, webinars, conference sessions) will allow SLA members to customize for themselves the professional development they need at various stages in their careers.
- When members are able to identify relevant educational input to their careers throughout the professional working lives, the likelihood of long term loyalty increases.
- SLA stands to gain from an enhancement of its reputation as a source of high quality learning opportunities designed to support members' careers.

The drivers for these recommendations include a number of conditions:

- Too many channels for delivering content lead to overlap, confusion, inefficiencies, lost content, and dilution of offerings.
- A comprehensive progression from beginner to expert levels is lacking.
- Due to the 18-month planning cycle (being partly addressed by the "emerging topics" approach instituted for 2016), conference content is sometimes described as dated.
- Access to educational content is somewhat spotty and random (depending on a member's geographic location and attendance at conference).
- There is no systematic process in place to vet, evaluate, coordinate, justify, or prioritize new products and services.
- Content development is performed by volunteers, leading to inconsistency and gaps.
- Existing technological capability inhibits options for online content storage and does not support statistical analysis of member activity. Lack of insight into past consumption hinders the ability to define new products and services.

6. Area IV: Conference Models

This section focuses on the content and timing of major events. Input from the Events Director is gratefully acknowledged as contributing to forging recommendations for the financial relationships between units and SLA regarding annual conference.

6.1 Recommendations for SLA's Future Conference Model

SLA's annual conference should be a unifying highlight for members, one that clearly justifies the registration fee. Its professional development content and networking opportunities should be the competitive edge setting SLA apart from other options.

Key areas of attention are leader orientation, annual conference content, and annual conference planning and funding.

6.1.a Recommendations for Leadership Orientation and Training

NOTE: These recommendations were formulated early in the project and acted on by the Board during its 8 April 2015 meeting. They are included here for the sake of completeness.

- Transfer the investment of time, effort, and cost - on the part of staff, the Board, and attendees - from Leadership Summit to alternative options for leadership training.
- Hold an intensive in-person training meeting for board members in January to provide the opportunity for in-depth orientation from staff and for board members and staff members to get to know each other.
- Train new unit leaders through a recorded webinar series of instructional sessions covering the basics.
- Build a robust "Unit Leadership 101" section of the website offering guidance for the official requirements of filing reports as well as tips and inspiration for successful unit management.
- While it is impossible to enforce a requirement that unit leaders complete the "basic training" before taking office, a greater emphasis on member self-orientation would allow shifting precious staff time to more beneficial activity.
- Ensure that the annual conference contains the general leadership skills sessions SLA members have been requesting.

6.1.b Recommendations for Annual Conference - Content

The overall framework for educational opportunities is that "throughout the year, members benefit from online content offerings ... they go to conference to be with other members to exchange ideas and experience." **Networking is an enduring value of in-person events.**

- Emphasize discussion type sessions at conference to maximize the opportunity for attendees to interact (as opposed to simply attending a live version of a webinar).
- **Encourage units to have board and business meetings online to maximize opportunities to network at conference.**
- **Explore options for online content to complement the face-to-face conference content**
- Configure the content of the conference to meet the full gamut of educational needs across all career stages. It may be helpful to visualize a "grid" or matrix of content for conference, as well as other delivery channels to ensure all career levels and topics are covered - in webinars, seminars, courses, and sessions at conference. Within each cell, there are multiple topics, delivery channels, and "owners" (e.g. business partner underwriters, academic content developers, etc). In addition, the matrix of offerings includes a track providing unit volunteers the opportunity to network and exchange ideas and experience.

LEVEL	Technical/Subject Skills	Business Skills	Interpersonal Skills
Learn			
Do			
Direct			
Unit Leader track: Opportunities for unit leaders to learn relevant skills and to network (evergreen).			

- The *Learn* level corresponds to *understanding*. Content presented here is intended to provide overviews and introductions to familiarize attendees with the details of the topic at hand.
- The *Do* level corresponds to *executing*. Content at this level is intended to enable attendees to perform the activity or function being discussed or to provide practitioners an opportunity to discuss practical details.
- The *Direct* level corresponds to *planning and managing*. Content developed for this level is aimed at professionals who are leading teams engaged in, or managing projects involving, the activity in question.

The **examples of session titles** listed in the table below are meant to illustrate the progression. In addition to the career oriented sessions provided for in the grid, the annual conference would feature evergreen sessions to offer opportunities for unit leaders to meet and network and exchange ideas and experience.

The 2016 conference features topical tracks and thus points to the 2017 conference being a transition event toward the grid model.

Examples of topics for each level and skill type:

	Technical/Subject Skills	Business Skills	Interpersonal Skills
Learn	<ul style="list-style-type: none"> • Running a webinar or online meeting: An overview of the tools • The newbie's guide to document management 	<ul style="list-style-type: none"> • The seller-buyer relationship: Understanding licenses and copyright • Effective report writing: Getting your message across 	<ul style="list-style-type: none"> • Understanding interpersonal dynamics in the workplace • Understanding organizational culture
Do	<ul style="list-style-type: none"> • New tools in content management • Designing a positive user experience through gamification 	<ul style="list-style-type: none"> • Negotiating with vendors: Building win-win relationships to provide maximum value for users • Vendors as trainers: Leveraging vendor expertise 	<ul style="list-style-type: none"> • Transitioning to supervision: Essential skills for team leaders • Management by coaching: Helping staff succeed
Direct	<ul style="list-style-type: none"> • KM platforms: Maximizing adoption and user satisfaction • Social media management: Strategies and case studies 	<ul style="list-style-type: none"> • Strategic business cases: Arguing for major investments • Boardroom savvy: Impactful communication 	<ul style="list-style-type: none"> • Workplace dysfunction: A manager's responsibilities • Leadership by inspiration
Unit Leader track: Opportunities for unit leaders to network and learn relevant skills (evergreen).			

6.1.c Recommendations for Annual Conference - Planning

The overall framework is an emphasis on coordination based on **input** from divisions rather than hands on planning. **Such input continues to be essential. Consider using a call-for-proposals approach to heighten the quality and relevance of sessions.**

- Entrust the content management of the conference to a professional (or two) with qualifications in the information profession and in adult education, **who will work closely with divisions**. Using the above

grid as a guide, the professional educational content manager will ensure appropriate coverage of 'evergreen' and emerging topics based on input from division volunteers.

- **Move away from the model of number of session slots being determined by division size.**
- Continue to solicit suggestions and proposals for topics and speakers from SLA members, and position divisions' role as providing input and suggestions based on specialized knowledge.
- Establish a system whereby SLA members may **record their own attendance and learning** as they accumulate sessions attended. Short of certification, such a system avoids the obvious difficulties associated with managing a formal accreditation program yet still allows members to demonstrate their educational attainment.
- **Establish a "conference chair" position on the Board in order to provide for closer collaboration between the Board, staff, and volunteers in the shaping of conference.**

6.1.d Recommendations for Annual Conference - Funding

The overall framework is the unjustifiable level of effort associated with the current conference funding model in which a staggering amount of time is devoted to ascertaining how much divisions owe for their orders of microphones and food.

- In keeping with the collaborative planning of conference content, the payment for venue related expenses should be handled centrally. Just as member engagement in content planning is shifting, so too the current backing and forthing of money should shift to a streamlined model in which the cost of operating a conference is paid out of registration fees, exhibit fees, and sponsorships exclusively. In effect, the conference will be what the association can afford - not a conglomerate of unit contributions.
- The conference planning team should be in charge of determining the requirements for room setups and AV and manage such arrangements with the venue.
- Negotiations for **conference** sponsorships should be managed centrally.
- Focus sponsorships on educational content as opposed to social events.
- SLA staff are currently developing a proposal for streamlining the sponsorship process.

6.1.e Recommendations for Annual Conference - Other

- To accommodate the preferences of all members, alternate between weekend and weekday scheduling.
- Three days are sufficient for a concise and focused educational event with fewer but higher-quality sessions.
- To distribute fairly the location of the conference in terms of member travel, select conference locations in eastern, midwestern, and western zones according to member residence **and ease of travel for overseas delegates** (for example, if 75% of members reside in an eastern zone, then 3 out of 4 years would see the conference held in an eastern location).
- **Continue to assess venue logistics in view of the actual needs of conference.**
- Consider opportunities to invite other related associations to co-locate their conferences (with exhibits if applicable) with SLA. In effect, SLA would charge a profit-making fee to such associations for the logistics management.
- At the conclusion of each conference, take advantage of the fact that attendees are "pumped" and sell discount codes for use in obtaining "last year's price" at the time of next year's registration.

6.2 Benefits and Drivers

Board Charge: The RFI document stated that the models for the Leadership Summit and Annual Conference "need to be rethought and re-envisioned" to increase market place interest.

The Challenge: SLA's greatest challenge in the area of conferences is the

historic dependency on divisions to determine conference content.

Recommended Strategy: The key strategy is to (1) streamline new leader and new board member orientation and (2) make the significant transition away from annual conference being divisional conferences-within-a-conference. (It is noted that the American Association of Law Librarians identified a similar challenge with its annual conference.)

Resulting Benefits: Directing resources to the annual conference serves to enhance its status as the must-attend event. Carefully structured content designed to meet member needs and delivered in a manner suitable for adult learners will emphasize quality over quantity and better equip members to succeed in their careers and serve their organizations.

The following outlines the advantages of the proposed new model and lists the major reasons for recommending a significantly different approach.

6.2.a Leadership Orientation

- Unit resources vary, leading to an inequity in the ability to send representatives to a face-to-face leadership training event. Providing leadership training through the SLA website, recorded webinars, and live webinars offers equal opportunity for all unit leaders to benefit from training and leadership development.
- Having "Unit Leadership 101" materials available in webinar form will improve the return on investment in that once created, the materials would need only updating and in that they can be consulted at any time by unit leaders.
- Originally, Leadership Summit was conceived as an investment in leaders and a training opportunity to get new unit leaders up to speed for their recently assumed roles. In addition, it was a second opportunity in the year for unit leaders to meet, hold unit board meetings, and exchange ideas and experience regarding the management of their units.
- In addition, Leadership Summit was intended to provide an opportunity for board training. Over time, given the demands on board members' time, that training has shrunk to a short presentation on confidentiality and Robert's Rules. Board members do not in fact have the benefit of in-depth orientation as to their responsibilities and obligations.
- As the considerable effort, time, and expense - for members and units - for Leadership Summit is not justifiable (even though it may break even financially) in terms of the results it produces, shifting away from a separate onsite meeting will allow staff to focus energies on other priorities. Doing so will also position the Annual Conference as *the* event to attend.
- Intensive webinar based instruction in the basics of SLA unit management will be a more productive use of staff effort and time and will yield greater benefit for new unit leaders who will have the opportunity to view and re-view the instructional materials as much as they need to.
- There will be no loss of opportunity for unit leaders to exchange ideas and experience as Annual Conference would have sessions devoted to such purposes.
- All unit leaders deserve the opportunity and benefit of thorough 'basic training'. This may be especially true for those struggling to recruit and develop new leaders and less able to attend Summit. Unit leaders have indicated the need for more robust and detailed resources to guide their activities throughout the year and particularly during the period of transition from one year to the next.
- Summit feedback indicates that the number one reason (40% of those responding) for not attending Summit is lack of funding from either the employer or the unit. From an attendee perspective, not spending money on Leadership Summit could enhance the opportunity to attend the annual conference.
- Having an intensive multi-day meeting in January for the Board would provide much better opportunities to educate board members about their roles and obligations, to provide valuable professional development training, and to foster closer relationships between board and staff

members. Such a meeting would maximize the chances that the new board will be successful during its term.

6.2.b Annual Conference

- Availability of opportunities in professional development are plentiful nowadays, and SLA members have alternatives to conference. In addition, SLA members have alternative ways of learning about vendor products and services. The annual conference is now competing with other offerings in many cases perceived to be more affordable than the current conference registration fee.
- Collaborative content planning will make for a coordinated program with fewer but high quality sessions. Anecdotal feedback has suggested that the quality of sessions at annual conference is at best a mix reaching a satisfactory but not an outstanding level. **Ensure that each session description features the specific learning outcomes.**
- Cutting the number of sessions back (say, to just over half) will yield the added benefit of reducing the space requirements.
- In the past, division responsibility for conference content has led to self-serving sessions aimed only at the sponsoring division's members and to some degree of duplication as multiple divisions each desired to put on a session dealing with the latest hot topics or technologies. (Efforts in recent years at encouraging divisions to co-sponsor sessions have been successful to a degree but not entirely.) The divisional responsibility for conference content has created what is in effect a multitude of subconferences with duplication in sessions rather than a single coordinated event in which it is ensured that there will be valuable sessions for any attendee regardless of his or her career stage and career goals.
- **A tracking capability enabling members to accumulate their learning history would be desirable.**
- Staff are in effect teaching 26 division volunteers - who may have no experience whatsoever in planning educational events - how to become conference planners. That teaching effort is repeated every year as a new generation of division volunteers takes over. This immense investment of time on the part of staff is not delivering the optimal quality of sessions because each divisional planner tends to look at perceived divisional needs, not at the overall value for all attendees.
- Staff are spending inordinate amounts of time (through three months following on the conference) calculating what divisions each owe for AV, food, and beverages for their events.
- Industry trends indicate clear support for this approach to unified conference planning and an emphasis on quality over quantity. Findings from the American Association of Law Librarians reflect this trend. The following is excerpted from an AALL report on its conference (Velvet Chainsaw Consulting, 2011):

The SIS [special interest sections] groups do not offer programming that's in the best interest of AALL's top three audience segments that will help the conference grow. Nor do they offer conference programs that help further AALL's mission and strategic plan. Instead, it's become a smorgasbord buffet of anything-goes-content and speakers ultimately watering down the entire conference experience for the attendee. To the average member, there is an obvious disconnect in the current conference programming although he/she may not be able to specifically identify the SIS-AALL tension.

AALL could provide leadership and basic association 101 training for all SIS leaders. They could help SIS leadership understand that AALL needs to be market-driven: looking at the needs and wants of the profession they serve, not just the smaller groups within the profession.

7. Area V: Organizational Review

Having been designed over 100 years ago, SLA's structure is not necessarily still optimal. The following **sets out** a model for how SLA can work now and in the future. **Building on past reorganizations of units (e.g. division mergers or divisions becoming sections of other divisions)**, the model is intended to facilitate delivery of value for members and to direct volunteer effort toward that purpose (as opposed to operating a "bureaucratic unit apparatus" that has become unnecessary and/or unproductive through the passing of many decades). **The goal is a collaborative structure as opposed to a top-down or bottom-up structure.**

Within the vision of SLA being *the association for information professionals seeking to be the best they can be in their careers and striving to advance the goals of the organizations they serve*, it is recommended that all considerations of SLA's structure be made in the context of ensuring volunteers' efforts are dedicated to the members' ability to excel in their careers.

While the current unit structure is appreciated by members for networking, *unit resources may not be being used to* produce value for members overall.

Please see Section 8 for recommendations related to the financial transactions currently occurring between units and SLA.

7.1 Recommendations for SLA's Organization

The recommendations are clustered in groupings focused on the overall association structure, headquarters, the Board of Directors, and communications from those entities.

The overall strategy is twofold: (1) Construct SLA as *one* association rather than 80+ individual units acting independently, sometimes at cross purposes with each other and with the association as a whole. (2) Concentrate volunteer efforts on the strategic priority of developing and delivering high quality professional development, networking, and collaboration rather than on the administration of unit operations.

7.1.a Recommendations for Divisions

SLA's divisions serve the association and benefit members by bringing together information professionals who share similar work environments, industry sectors, subject specialties, or technical skill sets. Divisions are well positioned within the organization to facilitate career development for members through continuing education, networking, mentoring, and career counseling. Over time, divisions have formed in response to the changing economy and information industry, and their primary identity has been associated with conference program planning. A move toward collaborative conference planning will allow division leaders and members to focus valuable volunteer time and attention on a wide range of relationship-building activities.

- Shift division focus from annual conference planning to year-round continuing education, robust special-interest-group networking, and career counseling.
- Consider consolidating the number of subject divisions in order to provide for greater synergies and more robust divisions. Still offering members the opportunity to focus on relevant topics and industry appropriate business partners, a smaller number of larger divisions would simplify members' ability to determine their "subject affiliation" and to some extent address inter-divisional competition (member poaching, as it has been called). Divisions' leaders would be invited to assess logical and beneficial mergers. Consolidated divisions could function largely as divisions do today, with a shift of the volunteer opportunities and committee structures from conference planning and unit administration to development of educational content and opportunities. **There would be just as many volunteer roles as always, if not more.**
- Ensure that the structure of each division encourages a focus on education and career enhancement (rather than on operating the division as an independent association). **Volunteer positions offer valuable practical experience for SLA members, and positions required in units should reflect the developmental needs of members, as well as the needs of the association.**
- The new divisions should be tasked to adhere to a new set of standards, as follows:
 - Divisions operate as special interest groups under the SLA brand, not as independent entities, and **adhere to all SLA branding conventions**

- Divisions work closely with the HQ content and conference managers to ensure any specialized educational offerings are aligned with the "grid" and with existing or planned offerings

The following excerpt from an AALL report on its conference (Velvet Chainsaw Consulting, 2011) provides a model of how divisions may offer valuable collaboration opportunities for association members:

Consider the experience of the International Food Technologist Society (IFTS) in reconfiguring its special interest groups. The IFTS is one association that transitioned its special interest groups (called divisions) into online communities only. They stopped allowing each division to have their own budgets and executive board. They provided ample training to the leadership so that they could become online community managers focused on helping their groups connect online, provide resources within their communities and curate content. While many thought IFT's Board's decisions were too rash, the outcomes have been the opposite. It was a risk that they couldn't afford not to take. They realized that that they ran far less risk of having able people as online community managers than the risk of offering mediocrity in their programming to all its members if they continued with their old model.

7.1.b Recommendations for Chapters

SLA members value their affiliation with colleagues living in the same geographic area and working in similar industries. The strategic goal is to leverage unit loyalty and engagement to continue providing member benefit to increase the value of membership in SLA overall. Strong units afford many opportunities for member engagement and value creation.

- Reduce the level of challenge for smaller and/or dispersed chapters by enhancing the SLA member offerings available virtually. It should not stand in the way of a member's ability to benefit from the SLA membership and to take advantage of products and services that he or she happens not to live in a major urban area.
- Offer support and guidance for struggling chapters who may wish to transit to caucus status, or merge with larger chapters
- Enforce the reporting requirements for chapters. Larger chapters may be able to aid smaller in this.
- Reduce the impact on staff by creating 'self-serve' tools for units. For example, a forum for unit leaders could be configured such that it automatically emptied at year end, requiring the new or continuing leaders to sign themselves up for the following year.

7.1.c Recommendations for Caucuses, Committees, and Councils

- Cull the number of committees and councils, maintaining only those serving a clear purpose (the Virtual Worlds Advisory Council is often cited as an example of an entity having outlived its original function). Build a sunset clause into the charge of any non-essential committee or council so as to avoid perpetuating it beyond its useful life. Ensure the Board reviews the lineup of committees and councils every year in light of the overall strategy of focusing on professional development.

7.1.d Recommendations for SLA's Headquarters

- On an urgent basis, upgrade the technology infrastructure to bring it up to capability in supporting staff to deliver value for members. SLA should immediately begin to address the technology requirement.
- Focus efforts on member value by shifting work from tasks that could be streamlines, automated, or transferred to other professionals toward development of products and services and toward long term profitable relationships with business partners.
- Cement the principle that SLA, not an individual unit, is the main contact for SLA's major business partners for maximum overall value. That way, business partners get a steady contact as opposed to dealing with ever changing unit leaders.
- Ensure an appropriate balance at HQ between senior and experienced personnel and capable support personnel. Productivity will be enhanced when the right level of staff are assigned to the tasks at hand.

7.1.e Recommendations for SLA's Board of Directors

- Adopt a competency based board. Develop clear guidelines for the committee nominating candidates for election. In the selection of candidates, emphasize specific competencies so that the Board will

maximize the likelihood of including individuals knowledgeable about developments in the profession, adult education, technology, finances, etc.

- Provide instruments (e.g. a short fillable job description based form) to enable potential candidates to self identify and to demonstrate their business and management related skills and to understand what is expected of a board member.
- Remove artificial barriers (such as limitations based on other kinds of service) to getting "the right people" into board service.
- Investigate revising the Board structure and size to provide for a Board that is agile and able to provide strategic direction for SLA as a whole.
- Divide the duties of the President and the President-Elect more equally and eliminate the role of Past President. Two years of intense service is plenty. Any past president will likely be generous in offering input when it is requested.
- Accordingly, it is recommended that the Board consist of the President, the President-Elect, the Treasurer, the Secretary, Unit/Member representatives, and Advisors as needed. At a "not-to-exceed" smaller number of members, the Board would not need to divide itself into a "full Board" and an "Executive Committee", thus expediting the Board's ability to govern and respond to evolving needs. In future, the advisory roles could shift to different areas of focus as needed.
- Govern strategically and appoint committees, councils and task forces only as needed.
- Provide an end-of-year "status report" capturing matters or initiatives in progress in order to minimize the stop-and-start repetition seen for some years. Maintain a "project chart" to enable tracking of initiatives and prevent the launch of new ones on top of recent similar ones.

7.1.f Recommendations for Communications

- Develop a cohesive and coordinated communication policy clearly delineating what entity is saying what to what audiences. The following channels are envisioned within Higher Logic:
 - The President needs a channel for communicating to members and another for communicating about SLA "to the world".
 - HQ staff need a channel to keep members aware of new developments, services, and offerings.
 - Unit leaders need a forum for interacting virtually.
 - Members need a means to communicate with each other.
 - Members and units need channels to communicate with the Board and HQ staff

7.2 Benefits and Drivers

Board Charge: The RFI stated the desire for a review of the association and the requirements for excelling and delivering maximum value to the membership.

The Challenge: SLA's greatest challenges in the area of its organization are the composition and governing strength of the Board of Directors and the bureaucratic weight of unit management.

Recommended Strategy: There are key benefits to be had by simplifying the structure and reducing the bureaucratic "apparatus" of SLA that has been draining volunteer effort away from strategic work.

Resulting Benefits: If all the spectacular energy offered by SLA volunteers were directed toward educational offerings, community building, and networking opportunities, the value proposition of SLA would dramatically increase.

7.2.a SLA's Organizational Structure

- Reducing emphasis on unit management positions allows a new emphasis on SLA's reason for being - educational opportunities. The proposed emphasis on an SLA-wide strategy provides for SLA members to contribute directly to the development and delivery of education.
- Encouraging geographic units to choose to become caucuses, thereby reducing documentation efforts, is an opportunity to cut down on administrative effort not yielding career benefits for members.
- A focus on educational content provides opportunities for all SLA members, regardless of location of subject focus, to contribute to the common treasure of learning elements.
- **While** unit events benefit certain segments of SLA's membership, coordinating volunteer efforts and funding from business partners **with HQ could** benefit all SLA members regardless of location or industry.
- Targeted and strategic allocation of resources to committees and councils maximizes the skills and contributions of volunteer energy.

Unit operation consumes volunteer time that could be spent on more strategic efforts:

- **Most** members affiliate more strongly with their units than with SLA overall; **this is not necessarily bad and it does build loyalty but in some instances it does lead to** duplicate efforts among themselves (e.g. similar events and activities are invented many times over).
- **To some extent** the traditional unit structure **places more emphasis on** "how to fill unit positions and teach new volunteers the ropes" rather than to examining the question "how well is the unit model working to deliver career success?".
- The unit structure requires significant volunteer effort to manage (55 chapter presidents, elects, treasurers, programming chairs, etc; 26 division chairs, elects, treasurers, programming chairs, membership chairs, etc). It is not clear that **these efforts are** productive in delivering career value for members.

Units are not always successful in self-management:

- Historically, **some** units have some kind of difficulty completing the financial reports. Units may elect to have staff be a signatory on their bank accounts so that bank statements may be retrieved without effort on the units' part, but that offer has not been accepted universally.
- It is not clear that the traditional Leadership Summit addresses the "struggling unit" difficulty.
- There is evidence of transition challenges - new unit leaders start from scratch and spend many months getting oriented to the requirements of their roles. New unit leaders appear to need a tool to get up to speed as the handover process from previous leaders is not always successful.
- Some units report difficulty finding volunteers, and a core group of individuals recycle themselves.
- Some units' websites have not been updated for a very long time.

Units may work at cross-purposes with SLA:

- Units are observed to arrange webinars with business partners without giving staff the opportunity to **help coordinate** SLA-wide offerings.
- Low awareness on the part of members in units as to what staff are capable of doing leads to valuable knowledge and support going unused while unit leaders fend for themselves.
- Units are not yet **consistently** collaborating with other units (e.g. in entering events on common calendar).
- Independent conferences may dilute business partner support and detract from annual conference attendance.
- Units **may not realise the extent to which they leverage the SLA brand** when they negotiate for independent sponsorship.

7.2.b SLA Staff

Restructuring the financial relationship between units and SLA will reduce the heavy administrative burden on staff and free up time to focus on **initiatives that deliver value to members**.

- **Rather than have to** micromanage report submissions and financial transactions, efforts may be dedicated to educational opportunities and business partner relationships.
- When HQ staff are freed up to focus on SLA-wide initiatives, staff expertise - in which SLA has long invested – can be directed toward member services.

Allocation of staff time:

- The time of staff ought to be spent on value-for-member activities - not on coping with inadequate infrastructure, and populating discussion lists. In particular, the technology used at headquarters is outdated and inadequate for the service expectations of members. Staff members spend an inordinate amount of time attempting to compensate for the failings of the technology - time that could be spent on activities delivering value for members.
- The archiving function is lost, meaning that it is difficult to track down who did what when. Nothing has been archived since 2009.
- Basic processes are cumbersome. Bolted-on other systems are used (e.g. Reg-Online for non-conference registrations) with the result that it is not possible to e.g. track who attended an event.
- All staff seem distracted by clerical/administrative tasks - each area handles its own accounting end (e.g. issuing a receipt for a course payment).

Technical infrastructure:

- Technology infrastructure is aging and fails on occasion, requiring intense efforts to recover. When the system goes down (4-5x/yr), **it is an inconvenience and annoyance to many.**
- Aging technology **is a large** drain on staff time. Infrastructure limitations hinder delivery of certain functions and make many functions laborious (through workarounds). Inadequate infrastructure is causing extra busy-work for staff e.g. in resetting passwords - the AMS could be upgraded to handle that type of work, but there has not been budget in some years now to do upgrades.
- Inadequate infrastructure limits ability to deliver good user experience on the website, in registering for events, etc. Demand from members requesting assistance is significant, pointing to **the website being difficult to navigate independently** ("where do I find ...?").
- Lack of technology resources is hindering delivery of new products and services.

7.2.c SLA's Board of Directors

Any board of directors seeks to maximize benefits for members. SLA will want to ensure the board of directors focuses on essential matters. In the interest of not getting side tracked, the SLA Board of Directors 2015 will want to consider that a new association structure gives it the ability to focus on the big picture of governance and to deliver a new workable model for future boards:

- A smaller and competencies based Board **may more** knowledgeably focus on key strategic matters (e.g. how to allocate funds for development of educational content). The Board's large size may be hindering its effectiveness.
- The Board can focus on strategic initiatives as opposed to dealing with administrative tasks. The Board should govern, not manage.
- The Board can address key challenges without being distracted (e.g. by unit requests for exemptions from the reporting requirements).
- It is unclear that **having six** Cabinet related posts and director-at-large positions (**without remit or specialisation**) are providing the kind of value they might once have done. **Consideration needs to be given to a board structure which maximises board effectiveness while also retaining unit representation.**
- There appears to be a temptation to address challenges by "setting up a task force or committee" rather than making a decision. Task forces and committees have a tendency to end up working in isolation and reinventing the wheel.
- Ideas are put forth each year in various board documents, yet those ideas seem to languish and be lost as there is limited continuity from one presidency to the next. As a result, there is considerable

repetition year to year in task forces and committees and their resulting documents. "Bright ideas" recur with regularity and are not necessarily checked with staff for feasibility before they are posed in a board document.

- The Board may tend to micromanage instead of referring decisions back to staff.

7.3.d Communications

- There are many players in communicating to membership - the President, task force members, staff members, and the website. As a result, SLA messaging to members is scattered and uncoordinated. **Explore how to coordinate efforts across staff, relevant committees, councils and task forces.**
- The fact that email messages from HQ come from individual names detracts from the SLA brand and confuses members.
- No overall policy exists for communication through the various delivery channels; a volunteer committee (though greatly appreciated) is filling the social media vacuum, shedding an uncomfortable light on staff resources.

8. Area VI: Revenue Model and Financial Review

Recommendations shown in other sections of this report will have impact on SLA's financial position.

SLA has operated for many years on a consistent model of revenue generation and financial management. Revenues have come from member dues and the annual conference while financial management depends on volunteers, available staff, and outside contractors. In periods of rising membership levels and economic prosperity, the model largely worked. Recent trends indicate, however, that the operating budget would benefit from diversification in revenue streams, from more goal oriented spending, and from expert financial management.

SLA is a single not-for-profit organization with a collaborative administrative function and units operating geographically or across topic specialities. Units manage assets and liabilities at the unit level, reporting annually to headquarters. Although units generate and manage revenues, these assets legally belong to the association at large.

SLA faces serious a serious challenge in its financial situation. Dues income continues a downward trend, conference costs are high in 2015, and conference related sponsorships and exhibit income are sharply down.

Funds currently held by units are not at work to address the association's overall financial challenges. Requesting that units participate in addressing the losses currently affecting SLA remains an option of last resort.

The overall strategy for revenue models and financial management calls for establishing a competitive and value based dues structure, diversifying revenue streams, and tightening financial oversight.

8.1 Options for Securing Funds from SLA's Legal Assets

- Pursue a bridge loan against the building to avert a shortfall in cash flow. (This initiative is currently underway.)
- Investigate implications of reducing the list price on the headquarters building.

- Ask units if they are willing to help fund specific association initiatives or development of new products and services (as done in 2011-12.)
- As a last resort, consider accessing unit funds through an assessment on all unit accounts. The exact percentage could depend on a number of factors.
- Consider the possibility of obtaining a loan against units' pooled income funds.

8.2 Recommendations for Revenue

8.2.a Realign Unit Relationships with SLA

- Capitalize on existing opportunities (e.g. niche sponsors) by collaborating and upselling where possible.
- Create a "one SLA" financial model through new unit guidelines for finances. Consider terminating the practice of issuing allotments to units or possibly a portion of it.
- Establish association-wide collaborative procedures for obtaining revenues from business partners and establish a revenue sharing model with units that upsell or otherwise contribute to the successful conclusion of a sponsorship agreement benefitting all parties.

8.2.b Realign Dues and Fees

Staff are already working on a recommendation for increasing member dues.

- Establish one rate for full/regular/individual membership rate that compares with other organizations, reflects costs to support a member, and represents a clear value to the member. Other dues categories could include one rate for Students, Retired Members, Unemployed Members, and another for Organizations or Business Partners.
- Consider whether dues categories based on salary levels are in the best interests of SLA and its members.
- Membership will include selected products and services at no additional charge and exclusive access to additional fee-based products and services.
- Apply strategic and intentional design of availability and pricing for products and services for members and non-members. For example, limit discussion lists to members.

8.2.c Coordinate Conference Sponsorship Activities

- Negotiations for conference sponsorships, including those supporting specific unit-level activities, should be done collaboratively between headquarters and units.
- Leverage unit relationships with business partners and staff expertise to enable a mutually beneficial revenue-sharing arrangement with units instrumental in achieving sponsorship revenue.
- Coordinate for a full recognition of the total contribution made by a business partner during a year or major event (e.g. to support multiple sessions).

8.3 Recommendations for Spending

- Significant cuts in spending have already been implemented, leaving few if any cost cutting opportunities.
- The top priority for SLA right now is to find ways to provide member services through contemporary technology.

8.4 Recommendations for the Financial Management Process

8.4.a Budgeting Process

- Re-evaluate the current budgeting process. Continue zero based budgeting, but establish means for staff to prioritize programs across departments and to defend budget proposals to the Board.

- Meet annually in November to finalize the budget. The meeting should include appropriate staff and board members (and board-elects), and the Finance Committee.
- Combine operating and program budgets into one for purposes of adoption.

8.4.b Financial Management Process

- Realign staff responsibilities to bring all finance and accounting processes in house.
- Assure professional expertise in financial oversight through engaging a controller or similarly trained/experienced professional.
- Assure that the Board candidates for treasurer have appropriate finance experience.

8.5 Benefits and Drivers

Board Charge: Regarding **revenue models**, the RFI stated: "Revenue models have been the same for many years and the revenue levels have been declining for a number of years. SLA needs new revenue models and new approaches for increasing revenue levels. Some of the answers will be directly linked to the resolution of other concerns." Regarding **financial status, review, and modeling**, the RFI stated: "During the past nine or more years SLA has shifted from being financially sound and secure to now having financial concerns. Much of this is a result of other concerns listed in this document. SLA needs a new look at revenue generation, expense management and associated financial modeling and forecasting - to return back to a period of financial security and solvency."

The Challenge: SLA's greatest challenges in the area of revenues and financial management have been its reliance on dues and conference to fund the organization.

Recommended Strategy: Establish a competitive and value based dues structure, diversify revenue streams, and tighten financial oversight.

Resulting Benefits: In an environment where the association has a clear, unique, and competitive position in the marketplace, it becomes much easier to communicate the value proposition. SLA understands who it serves and why, while members, prospective members, and industry partners understand the benefit of engaging with SLA. This foundation provides clarity in terms of appropriate and defensible dues structures, conference fees, product and services offerings, and product pricing.

Financial analysis and oversight requires data-driven action aligned with the association's mission and strategy. With the underlying technology in place along with industry standards of best practices for association financial management, SLA will be better positioned for insightful analysis of trends and positions, leading to better more informed decision-making in the future.

- The Board Finance Committee is currently developing and considering contingency plans for managing finances and cash flow. The recommendations in this report support those efforts. At this point in time, the association is not operating from a position of strength but rather in an environment of urgency. A bridge loan will address an immediate need but further weaken the organization with additional liabilities. While it is not ideal to sell the building at what might feel like something below market value, the financial position of the association does not afford the opportunity to wait for better times that no doubt lie ahead. Assets realized from the sale of the building and reduced costs of housing staff will deliver an immediate improvement in the association's financial position.
- Units have the right to leverage their assets and relationships to deliver value to their members; it should be understood, however, that they acquired those assets and relationships in part by leveraging the SLA brand. While accessing unit funds through an assessment **is not an easy option, and would require careful communication and collaboration with** unit leaders and members who dedicated their valuable skills and hard work to acquire these assets, the overall goal here is to boost SLA's ability to attract and keep loyal members and to create a more equitable sharing of income across the

association. Going forward, this new way of viewing unit assets will lead to a revision of unit operating guidelines that sets the stage for greater cooperation.

- A feature of this collaborative working relationship is the revenue generating opportunity of partnerships with industry business enterprises. Right now, SLA leaves money on the table by enabling fractured, transaction-based, decentralized interaction with business partners. Unit members have good business and personal relationships with business partners that could offer a benefit to the unit and the association as a whole, **especially if working in partnership with the development personnel at HQ**. Leveraging unit relationships with professional business development expertise through a centralized process stands to benefit all.

8.5.a Dues and Fees

- Positioning SLA as the premier organization for information professionals seeking to advance their careers and lead their organizations toward industry excellence means rethinking the cost and value of membership and member types. SLA will attract members willing and able to invest in their careers and to support the professional association that equips them for growth and excellence.
- Past initiatives to create a dues structure suitable for a global market and a range of member salaries have had implications in terms of member levels and the relationship between dues and costs to serve individual members. The current tiered dues structure is not yielding sustainable membership levels or delivering meaningful revenue.
- Clarifying what kinds of products and services come with membership provides a foundation for marketing the benefits of joining SLA. In the information industry, professional development content and networking opportunities are viewed as significant benefits that should be associated with appropriate fees to non-members.

8.5.b Financial Management Process

- Current weaknesses in the financial management process include a cumbersome budgeting process and the lack of financial management experience at the staff level. Some of this can be attributed to loss of key personnel, **past** policies and practices, and the practice of assigning remaining staff with additional responsibilities when other staff members leave the organization.
- The current budget process does not seem to afford staff adequate opportunity to submit, prioritize, and defend budget proposals within the overall context of association needs and board decision making. A revised budget process should include a face-to-face meeting in the fall when interested parties can thoroughly vet the proposed budget in the context of staff recommendations and their assumptions around best practices and in the context of the association's defined strategy for delivering member benefits.
- In order to better understand the overall spending on operations and programming these budgets should be combined into one. Thus, it is appropriate to bring board-elect members into the fall budget process.
- Historically, nominees for association treasurer have not been required to demonstrate financial background or expertise. This is problematic for an association with a budget the size of SLA's and should be addressed. The treasurer's position, along with other board positions, should be competency based with appropriate criteria to assure the best possible association leadership.

9. Area VII: Membership Levels

SLA does not exist to *have* members. It exists to *deliver value to* members. Therefore, the intention of the plans and recommendations in this report is to create products and services that deliver value to the target market of information professionals, thus creating an organization to which people will want to belong.

Tactics to simply boost membership numbers do not serve SLA's long term goals. With that in mind, using the number of members as a metric for success is inappropriate. Nevertheless, SLA must focus its market development efforts in order to solidify loyal membership. Attracting and retaining members who realize the value of SLA is critical to enabling the delivery of products and services that members value. This strategy will naturally lead to a global appeal for SLA as information professionals worldwide experience the benefit of belonging.

From a strategic and long term perspective, it is desirable to have loyal members who maintain their memberships for decades. Changes to the information profession and the information industry indicate that past assumptions surrounding association membership may not work today. Joining a professional association is not necessarily a given among today's knowledge worker, so it becomes all the more important to create products and services that deliver value, to communicate that value clearly, and to remain vigilant in adapting to member needs.

9.1 Recommendations for SLA's Membership Policy

- SLA's membership policy is based on a strategy to attract and retain members who value professional development, career advancement, and advancing the goals of the organizations they serve.
- Membership is open to all parties interested in the stated purpose of SLA.
- New members are accepted upon submission, receipt, and processing of the required registration application and fees.
- Memberships are for the specific and sole use of the registered individual for whom payment is made and are non-transferable.
- Members are invited from all countries. **We welcome and encourage the diversity and benefits brought to SLA by a strong international membership.**
- Member rights for all members, except organizational and honorary members, include but are not limited to the opportunity to vote in SLA elections and hold elected or appointed office.
- Member privileges include but are not limited to access to members-only benefits, products, and services offered with membership in the association.

9.2 Recommendations for SLA's Membership Development

The following recommendations draw heavily on SLA's Membership Director's report to the Board of Directors (EM0115-B01) dated January 2015.

9.2.a Awareness and Promotion

Activities in this area are intended to establish SLA's brand and create awareness among prospective members.

- Apply social media marketing principles to branding and messaging.
- Identify access points to reach non-members where they are.
- Create discoverable content for online behavior such as information searches, product searches, events, social media, and educational searches.
- Create special offers such as free white papers, free trials, sign-up for news alerts, etc.
- Plug leads into recruitment campaigns.
- Use Google remarketing to place ads in front of people who visit the SLA website.

9.2.b Recruitment

Activities in this area serve to invite new members to join SLA through various recruitment channels, moving individuals from awareness to paid memberships. **Units continue to play a major role in recruitment.**

- Prospective members can and should be reached through channels such as the following: industry partners, online advertising, search engine marketing, social media, units, webinars, word of mouth, and events.
- Use continuous campaigns and high value content driven offers to attract potential members.
- Use microsites to capture information from awareness pieces and follow up to recruit potential members.
- Create a pipeline of future full members through a strong student recruitment program.
- Buy the list from LinkedIn to launch a LinkedIn campaign to reach individuals in the SLA LinkedIn Group.
- Analyze new member data to discover which channels and campaigns have worked in order to refine and target recruitment activity.

9.2.c Engagement

Member engagement is an affirmation of value. Getting members to participate in SLA activities, purchase products, and connect is important to member retention and referrals.

- Address the members' stated desire for professional development and networking, particularly on the part of those who do not attend the annual conference.
- Surface educational material on the website, making it valuable and discoverable.
- Enhance the membership directory to facilitate connecting.
- **Take full advantage of planned software capabilities for building online communities as an improvement to current discussion lists.**
- Implement the mentor program capabilities of Higher Logic.

9.2.d Renewal

Renewals confirm that members perceive value in their membership. Retaining existing members is extremely cost effective compared to recruiting new members.

- **Use the expertise of the membership director to create a renewals process that maximises value and is monitored for effectiveness.**
- **Where members have indicated that they respond better to print,** include print reminders in addition to the email reminders.
- Improve online functions to facilitate renewals.

9.2.e Rejoining

Industry standard and current SLA practices call for retention of contact information for former members. Lapsed or lost members are very good prospects for rejoining.

- Develop messaging and offers to this group of individuals.
- Increase communications, both email and print.
- Assure that former members no longer have access to discussion lists or other member benefits.

9.3 Benefits and Drivers

Board Charge: Regarding membership levels, the RFI stated: "During the past 15 years there has been a consistent decrease in annual membership levels. This is a serious concern for the Association and requires close serious attention with innovative ideas to reverse this trend."

The Challenge: SLA's greatest challenge in the area of membership levels has been inconsistent recruitment efforts and the lack of tools for understanding member dynamics and demographics.

Recommended Strategy: Recommendations in this report related to membership levels are grounded on the assumption that SLA does not exist to *have* members. It exists to *deliver value* to members. In creating products and services that deliver value to information professionals, we create an organization to which people will want to belong.

Resulting Benefits: In this environment, the membership levels will calibrate accordingly. We know that there are some information industry associations in the marketplace with large memberships. As a consequence of clearly differentiating its market position and offering appropriate products and services, SLA has a better likelihood of achieving healthy and sustainable membership numbers. SLA has value to offer to members who perceive the value and are willing to pay for it.

- The recommendations take into account numerous factors including the relatively mature age of SLA members, past experience on what works and does not work in influencing membership levels, and the known factors influencing recruitment and retention.
- While the age of SLA members is not tracked generally, it is asked in conference surveys. For 2014, 58% of attendees were over 45 and 33.5% were over 55. Retirement is sure to have a notable impact.
- Between 2010 and 2020, 45% of librarians will reach retirement age of 65. ([Ageism in Academic Librarianship](#), Summer 2009.) Nearly one out of every 10 librarians is under the age of thirty. There is a significant market opportunity in this age group. ([Ageism in Academic Librarianship](#), Summer 2009.)
- Staff indicate that discounts and 'member get a member' campaigns do not work and that it is not cost effective to offer \$40 memberships.
- The units' practice of freely giving benefits to non-members, such as access to discussion lists and minimal price differentials in event registration costs, has diluted membership value.
- The perceived return on investment in membership dues relates to the benefits delivered. When a member says \$200 is too much to belong to SLA, it signals that he or she does not perceive enough value in member benefits to justify a dollar per working day in a year.
- We know that referrals are a good way to recruit new members. The 2014 Member Survey tells us that members join because someone told them to - 41% were encouraged while a student and 32% were encouraged by a colleague. We know that campaigns providing members with incentives to recruit new members have not proven effective. Thus, **it is suggested** that the best way to equip members to encourage new members through referrals is to deliver clear value to all members so that they can confidently recommend SLA to their colleagues based on the value they themselves have experienced.

10. Impact on Bylaws and Statements of Policies and Practices

Naturally, adoption of the above recommendations will require a detailed combing through current bylaws and statements of policies and practices to ensure they are in harmony.

In this context, it would be advisable in future to keep the level of detail to a minimum in bylaws and policy/practice documents as it is inevitable that environmental changes will occur faster in the future than they have in the past.

The following table illustrates some of the areas within the SLA Bylaws that are affected by the recommendations in this report:

Bylaws Affected	Related Recommendation
Article VII: Nomination and Election	Adopt governance, management, and financial skills based criteria for finding and vetting board candidates.
Article V: Board of Directors Article VI: Officers	Reduce the board size and eliminate the distinction between a full board and an executive committee.

Article XI: Chapters Article XII: Divisions	Within the recommended organizational structure, units would no longer receive allotments.
Article VIII: Chapter Cabinet Article IX: Division Cabinet Article X: Joint Cabinet	The matter of cabinets requires examination in light of the strategy to reassess the Board composition.