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**TO:** SLA Board of Directors  
**FROM:** SLA Board of Directors  
**DATE:** July 10, 2015  
**RE:** Road Map for the Future of SLA

**BACKGROUND INFORMATION:** The SLA Board of Directors developed this “road map” in July 2015 to help guide the board, SLA staff, and SLA members in implementing recommendations [OM0715-A01] designed to position SLA for the future. The board will vote whether to accept this road map at its meeting on 14 July 2015.

**Strategic overview of areas**

The SLA Board of Directors has identified strategic drivers within each change area that will be the focus of implementation plans.

**Recommendation 1:** That the Board of Directors vote to accept the “Road Map for the Future of SLA” (see below) as a high-level strategic framework to guide us in implementing changes that can lead to sustainability for SLA. (Accepting the report means the board approves the content/direction of the document and will now work toward implementation.) *\*Background on Recommendation 1 below “Recommendation 2.”*

**Recommendation 2:** That the Board task the change consultants with coordinating with SLA staff and the board in developing a multi-phased implementation plan that draws on both the “Board-Revised Recommendations” and recent member feedback. It should include mechanisms for further engaging members, whether by partnering with relevant units, committees and councils, and vendor partners or setting up focus groups.

**\*Background on Recommendation 1:** On July 14, the SLA Board of Directors will vote on whether to receive a set of recommendations designed to chart a new direction for SLA. These recommendations were initially prepared by the two change consultants the Board hired earlier this year to help move SLA forward, and they have since been revised by the board based on feedback from SLA members.

When the Board made the original recommendations report available to SLA members in May, members were invited to submit comments and suggestions. The written comments totaled nearly 250 pages, and many members shared their thoughts verbally at business and networking events in Boston during the annual conference.

The breadth and depth of the comments and suggestions are a testament to the passion the members feel for SLA and the value it provides them in their work and careers. The Board thanks each and every member who weighed in on the recommendations report, and also to the chapters,

divisions, and other units who shared their comments. Members have provided the Board with a wealth of ideas that will serve SLA well as we move forward with implementing changes that we all know must be made.

The Board also thanks the two change consultants, Cindy Shamel and Ulla de Stricker, for developing a report that was sweeping in its scope and bold in its purpose. Their report started a conversation within SLA—a conversation that was long overdue—about charting a new direction for all of us and making SLA even more valuable and necessary to special librarians in the years ahead.

The conversation we have been having has revealed some differences among us, but it has also made clear that we agree on some critical points. One is that SLA must make far-reaching changes—to our business model, our program and service offerings, our headquarters operations, and so on. Another, equally important, point is that SLA's strength and vitality lie in our diversity and specifically in the divisions, chapters and caucuses through which we share and express our interests.

These two points of agreement will drive the process of implementing the changes SLA will make over the next couple of years. Working together—members, units, the board, and SLA staff—we will put into place revised processes and procedures that will further invigorate our diverse chapters and divisions while also strengthening the ability of SLA as a whole to meet the professional needs of the global special librarian community.

In the July 14 Board meeting, the board will take as many as three votes:

- First, the board will vote on whether to receive the "[Board-Revised Recommendations](#)." (For those unfamiliar with board actions, "Receive" means the board has read the report and acknowledges the work done, but has not taken any action on it.)
- If the Board members agree to receive the Board-Revised Recommendations report, the Board will then vote on whether to accept the "Road Map for the Future of SLA." Prepared by the Board and SLA staff, the Road Map offers a summary of the steps the Board intends to follow in moving SLA forward. These steps include a focus on short-term actions SLA can take now to add value for members and ensure that we can become more nimble in responding to trends and market shifts in the future. ("Accept" means the Board approves the content/direction of the document and will now work toward implementation.)
- If the Board votes to receive the Board-Revised Recommendations and accept the Road Map, they will then vote to direct the change consultants to work with the Board and SLA staff to prepare a multi-phase implementation plan. That plan will be shared with you on the SLA Website.

From that point forward, the Board will be working with SLA members and staff on each phase of the implementation plan. The Board will draw on the recommendations report, the ideas you shared with us during the comment period, and any new suggestions that come forward as we proceed.

# ROAD MAP FOR THE FUTURE OF SLA

## Strategic overview of areas

The SLA Board of Directors have identified strategic drivers within each change area that will be the focus of implementation plans.

### Area 1: Market Opportunities

*SLA's value proposition is its diversity across subject- and role-specific divisions and across geographic regions represented by chapters. This value proposition includes volunteer opportunities across the association. We must challenge ourselves to work together as one association to (1) expand without losing our sense of self, (2) create and exploit new opportunities, and (3) create a whole that is more than its constituent parts, yet emphatically cannot survive without them.*

- **MEMBER VALUE:** SLA membership is the foundation upon which you can grow and expand your career as an information professional, from entry-level positions to senior management and across disciplines, levels, organizations and areas of expertise. Focus on helping SLA members be fully equipped to deliver and demonstrate value to the enterprises they serve.
- **PROFESSIONAL DEVELOPMENT:** Encourage units to work with staff to develop products and services that support professional development, enable virtual and face-to-face networking opportunities, and expand into new markets.
- **LEADERSHIP DEVELOPMENT:** Feedback confirms that one reason members value SLA is the chance to engage in volunteer activities at various levels and develop communities that meet their needs. Volunteer opportunities and unique communities should be leveraged (particularly with the implementation of planned new software) to promote this value proposition.
- **PROMOTION:** Create clear, targeted and unified messaging and coordinate communications among relevant SLA staff, committees and councils and across traditional and social media platforms.

### Area 2: Business Partnerships

*Build on the understanding that vendors are valued partners in SLA and SLA's mission. Greater efficiencies and opportunities can come from collaborating with units to develop strong business partnerships.*

- **LEVERAGE AND STREAMLINE:** Many units have strong relationships with specific vendors, and securing vendor sponsorships is an important skill to develop. Explore how coordinating sponsorships with SLA staff might provide efficiencies and a consistent approach to developing and nurturing SLA's relationships with business partners.
- **BEST PRACTICES:** Utilize the expertise of headquarters staff and units with demonstrated successes to show how to collaborate in raising monetary support.
- **WIN-WIN:** Direct SLA staff and units to collaborate with sponsors in incorporating mutual needs and innovations into initiatives across the business and information industry arenas. Doing so can clearly demonstrate sponsors' overall contributions to members and SLA while also offering opportunities to increase their impact and value.

### Area 3: New Products and Services

*SLA spans multiple professional niches across industries, roles, levels of expertise and geography. This diversity is a key strength and should be leveraged as much as possible. Whether you move from an academic to a government library, from an entry-level position to middle management, from a solo to a team environment, or from being based in the U.S. to working around the globe, SLA should offer educational and networking opportunities to support every phase of your career path.*

- **WHAT WE CAN DO RIGHT NOW:** Repackage and market current content (virtual programs, white papers, etc.) that will appeal to broader markets, such as virtual conference sessions

on finding people who don't want to be found and protecting yourself in social media environments.

- PROFESSIONAL DEVELOPMENT: Create training and learning opportunities focused on building members' skills and expertise throughout their careers. Focus on subject and role specializations (with input from units) as well as general leadership and business competencies. Seek out new learning partners who are willing to share their effort and expertise in building a broad range of content, some of it outside traditional information skill sets. Look to emerging roles to guide where we need to plan for the future.
- CREATE A LEARNING VAULT of educational content created by units, members, staff and/or business partners, organized by topic, that supports continuous learning.
- COMMUNITY: Leverage Higher Logic (new software currently being tested for rollout at SLA headquarters) to encourage the development of more virtual and in-person networks across disciplines.

#### **Area 4: Conference Model Evolution**

*SLA's annual conference should be a unifying highlight for members (with equal appeal to potential members) that clearly justifies the expense. Its professional development content and networking opportunities should set SLA apart from other options*

- CONTINUE TO EVOLVE the conference into a top-notch professional development event, with both general and subject-specific professional training and networking opportunities.
- STREAMLINE LOGISTICS: Explore how SLA headquarters could partner more closely with units to coordinate conference content, logistics and payments.
- INNOVATE PROGRAM SELECTION PROCESS: Conference councils in recent years have raised the bar here, resulting in more relevant session content. Continue to experiment with different session nomination processes that encourage the best and most relevant programs to be selected.
- DIVERSITY THROUGH COLLABORATION: Continue to ensure that conference content covers a wide variety of subjects and learning needs at multiple levels of expertise. Explore tracks, tying content to learning objectives and grids such as the Learn (understand) > Do (execute) > Direct (plan and manage) model offered by the consultants. Content should cover technical/subject skills, business skills and interpersonal skills as well as developing relevant skills for unit leaders.
- PARTNERSHIP OPPORTUNITIES: Invite other related associations to co-locate their conferences (with exhibits if applicable).
- CONTINUE TO EVALUATE current requirements for conference locations based on the requirements for our show in the following areas: meeting space needed, exhibit hall requirements, and hotel sleeping rooms. Explore cost savings associated with different meeting venues. Continue to talk to our vendor partners about how we can best serve their needs in the exhibit hall space. Is it time to re-evaluate how this space is set out?

#### **Leadership training**

- INCLUDE: Enable all SLA leaders to have access to the same leadership training by implementing the SLA Unit Leader Boot Camp of virtual training for new leaders.
- EXTEND invitations to partner with the Leadership and Management Division and other units to create a fee-based Leadership Development Institute for mentoring, leadership training, and career advancement for all members (this may also be marketed to non-members).

#### **Area 5: Organizational Review**

*Build on past reorganizations and reviews of unit structures (e.g., unit mergers or the creation of division sections) to create a more collaborative model that removes bureaucratic barriers to their existence while continuing to offer volunteer opportunities.*

#### **Headquarters**

- ASSOCIATION LEADERSHIP: Take steps to ensure suitable association leadership per recommendations from the Transition Committee.

- **SKILLS AUDIT:** Analyze SLA's staffing needs and capabilities to ensure that we have the right levels of support and skill sets where we need them.
- **TECHNOLOGY DEVELOPMENT:** Implement technology improvements to facilitate membership segment analyses in order to focus strategically on member service.

### **Units**

- **SYNERGIZE:** Encourage units (chapters, divisions, and caucuses) to look closely for and foster natural connections, synergies, partnerships, and/or mergers in order to realize economies of scale without losing value or volunteer opportunities.
- **MEMBER EXPERIENCE:** Ensure that SLA continues to provide a large range and variety of volunteer roles as part of SLA's enhanced learning experience. Offer members the chance to gain skills that directly relate to their careers and SLA involvement.

### **Board**

- **EVALUATE:** Critically evaluate board composition to ensure the best mix of roles to position the board to function more effectively while still representing diverse member interests.
- **SKILLS FOCUS:** Evaluate the process for nominating candidates to stand for election. Work to better define the skills needed for each role.
- **RELEVANCE:** Continually evaluate councils, committees and task forces to ensure the relevancy of their charge.

### **Area 6: Revenue Model and Financial Review**

*A sound financial footing is essential for the future of SLA and will be the basis upon which other recommendations can be implemented. Look for new sources of revenue generation, both short- and long-term, and ensure sound financial management in the future.*

- **CAPITALIZE** on existing SLA content that can be repackaged and marketed for immediate revenue gains. This may be an area where SLA units could volunteer to help put revenue-generating products in place.
- **ASSET MANAGEMENT:** Per the recommendation from the Finance Committee and the Building Sub-Committee, make a decision about the sale of the SLA headquarters building, including whether and when it might be appropriate to lower the asking price.
- **MEMBER DUES:** Evaluate and develop a dues structure that reflects both the cost and value of membership and supports SLA's sustainability over the long term.
- **CONTINGENCY PLANNING:** Continue to follow through on options suggested by the Finance Committee to bridge any anticipated funding shortfall.

### **Area 7: Membership Levels**

*SLA exists to offer value to its members. Ensuring a highly valuable member experience will encourage the retention of existing members, attract new members, and re-engage lapsed members.*

- **VALUE:** Focus on offering more content and opportunities that engage members and offer skills, experience, and contacts they need for their personal and professional development.
- **TARGET:** Create a clear picture of SLA's target members and develop strategies for reaching them. Coordinate efforts between SLA staff and relevant committees and councils as well as units.
- **CLEAR AND COORDINATED COMMUNICATIONS** around SLA's value are paramount. Review and extend communication channels to ensure that information is consistently and accurately flowing in all directions throughout the association.
- **MESSAGING:** Give members tools and channels that allow them to communicate their own values and successes.