

TO: ALA Executive Board

SUBJECT: Status Report on Electronic Member Participation

DATE: July 1, 2009

FROM: Keith Michael Fiels, Executive Director
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Implementation of the recommendations of the Task Force on Electronic Participation:

At the 2007 Annual Conference, ALA Council voted that a formal task force be established by the ALA President, charged with examining existing documents and developing recommendations to adapt association policy so as to help ALA move forward with effective e-participation practices; and that the task force complete its charge by Midwinter 2009.

In August 2007, Loriene Roy and Jim Rettig appointed the Task Force on Electronic Member Participation: “To examine existing documents and develop recommendations to adapt ALA policies to help the Association move forward with effective e-participation practices; to survey current and planned e-participation throughout the ALA and its units; to explore, in consultation with BARC, the financial implications of expanded e-participation.”

The Task Force Final Report was discussed at the 2009 ALA Midwinter Meeting. Council approved recommendations 1-5 of the Report. Referrals were discussed, but no formal motion to refer was made. Council referred items 6-16 to the ALA Executive Board, “to investigate general options for Council’s consideration, soliciting input from the ALA Executive Director, the Budget Analysis and Review Committee, and other bodies as the Executive Board deems necessary.”

While a number of Committees have already begun working on the implementation of the recommendations, on June 15, 2009, the ALA Executive Board formally:

- o Confirmed referral of recommendations 2, 3, 4 and 5 to the ALA Policy Monitoring Committee (PMC), based on Council action and discussion.

- Confirmed referral of recommendations 1, 2, 4, and 5 to the ALA Budget Analysis and Review Committee (BARC), based on Council action and discussion.
- Referred recommendations 6, 7, 8, 9, 10, 11, and 15 to BARC to review the direct and indirect financial implications.
- Referred recommendation 11 to PMC to review related procedures and protocols and make recommendations to the ALA Council.
- Referred recommendations 12 and 13 to ALA Constitution and Bylaws Committee to review and recommend revisions to Bylaws Articles, and make recommendations to the ALA Council.
- Referred recommendation 14 to the ALA Committee on Training, Orientation and Leadership Development to incorporate information about ALA policies regarding the conduct of business, including the Open Meetings Policy and related policies and practices of the Association, in future orientation and training for ALA leaders.
- Asked the ALA Conference Committee, the ALA Web Advisory Committee and the ALA Committee on Organization to review the Final Report of the TFOEMP and address its recommendations in their ongoing work.
- Asked the ASCLA LSSPS Accessibility Assembly to review the Final Report of the TFOEMP and to work with other involved ALA groups, to ensure that accessibility concerns related to e-participation were understood and addressed.

Experimentation with e-participation at Annual and Midwinter:

In response to the recommendation of the Task Force that ALA groups “experiment” with various models of e-participation, a LITA Task Force has created a “toolkit” to assist in that participation. The toolkit is at http://wikis.ala.org/lita/index.php/EParticipation_Task_Force_Recommendations. The Task Force is chaired by David Lee King. The chair is in communication with the chair of the ASCLA LSSPS Accessibility Assembly and will work with similar task forces in other divisions as they are identified.

Based on reports of experiments at the Denver Midwinter Meeting, it is clear that members were already experimenting. It is also clear that experience and technical skill levels vary widely. The development of the Toolkit by LITA was designed to address that skill/experience gap.

Issues of accessibility must clearly be addressed. Many of the “informal” e-participation strategies envisioned by members (see the Toolkit, above) rely on individual handheld devices and may in some cases present some accessibility challenges. This will be on the agenda of the Accessibility Assembly when they meet in Chicago.

In order to support this experimentation, ALA management has been working to make wireless broadband access available as a platform upon which individual groups can “build” meetings that combine face to face and virtual participants.

ALA began purchasing broad wireless access at convention centers several years ago and continues to do so. Wireless access is freely-available to attendees in most areas of the

convention being used by ALA (always excluding the Exhibits area, where access is fee-based). The cost to ALA for this “free” wireless will be \$10,000 at McCormick Place. The number of unique log-ins in previous years has been relatively low (approximately 1,000), but is likely to increase over time with increased member interest and education. It should be noted, however, that ALA cannot control the quality, robustness or consistency of this wireless connectivity.

In response to the charge from the TFOEMP and Council to “encourage experimentation,” ALA Conference Services explored the possibility of “buying out” wireless access in meeting rooms at conference hotels which include major meeting space. The costs were prohibitive, ranging from \$10,000 to \$160,000 per hotel, depending on the number of meeting rooms and other factors. The total cost of providing wireless for all meeting rooms at conference was \$260,000.

ALA has set aside \$40,000 from 2010 Initiative Funding to support experimentation at the 2009 Annual Conference (assuming an average cost of \$800/day, that would cover 50 meeting rooms for one day each). A range of groups has been identified to participate in the experiment. The groups vary by type (Board/committee/discussion group, ALA/Division/Round Table) and by the purpose for which they envision using the wireless connectivity. In some cases, wireless connectivity is viewed primarily as facilitating the work of the group – making it easier to collaborate with other groups in other locations, for instance. In other cases, groups are explicitly seeking to include member who cannot be physically present. In still other cases, groups are seeking to share discussion and ideas with members of the broader community, to increase interest in participation within their group and within ALA generally.

Groups experimenting with e-participation at the 2009 Annual Conference are being asked to provide feedback on their experience as input for future planning. Groups are being asked to provide the following types of information:

- How and for what purposes were e-participation strategies used?
- How satisfactory was the experience – for those physically present and for those participating remotely?
- What technological challenges did they encounter?
- How helpful was the Toolkit and what suggestions do they have for future improvement?

ALA Connect:

Phase 1 of ALA Connect went “live” on April 6. ALA Connect is built on an open-source platform (Drupal) that is widely used within the library community. An external developer (Urban Insight) was selected, based on a careful RFP process, to (a) create the “handshake” between ALA Connect and iMIS (ALA’s internal association management system, which includes membership records) and (b) develop customized features to support the work of ALA groups and to enable ALA members to network with one another. The ALA Web Advisory Committee worked closely with ALA ITTS, particularly with project lead Jenny Levine in defining the system.

ALA Connect includes two types of spaces: (1) ALA groups – groups to which a member must be elected (Council, Boards), appointed (most committees, task forces), or pay dues to join, and (2) Connect communities – informal groups which may be joined without requiring additional dues, election or appointment. The latter category includes groups that also exist in the formal ALA face-to-face environment (discussion groups, interest groups, etc.) and groups that exist

only informally in ALA Connect. (Note: This will, for the first time, provide most ALA discussion groups with a real “roster” of their participants – beyond an informal conference session signup sheet – and will enhance the capability of those groups for sustained effort and discussion.)

ALA Connect supports the work of official groups as well as informal collaboration and work by providing a robust set of functions:

- A group member may create a post (similar to a blog post), which may include one or more attachments, and others may comment on that post but not alter it.
- A group may collaboratively create a document.
- A group may hold a (synchronous) chat.
- A group may hold one or more asynchronous discussions.
- A group may vote – and create a voting record in the process.
- A group may create a group-specific calendar – for instance, including project deadlines, meeting dates/places, etc. Documents may be attached to calendar items – so that, for instance, an announcement of a committee meeting may have linked to it all the background documents and the agenda for that meeting.
- Groups may make any post, document, discussion or calendar private (available only to group members) or public. While groups are encouraged to make most things public, the ability to make them private, on an item-by-item basis, enables a group (for instance a Board) to make most things public but have private discussions and documents where necessitated by the nature of the material. Similarly, a group may choose to make its initial draft minutes private and, after review by the group, change the status to public.
- ALA Groups are automatically updated whenever data is changed in the association’s internal management system. So, when committee appointments change, the group is automatically updated in Connect. When a member updates their member profile, that information is automatically also changed within Connect the next time the person logs in to the site.

ALA Connect provides individuals with tools to help them manage their e-participation in a manner most comfortable to them.

- Members most comfortable having information come to them (email) may opt to receive an email notification whenever there is a new item in one of the groups to which they belong. They can make that decision on a group-by-group basis.
- Members who prefer receiving information via RSS feeds can subscribe to news from specific groups or all new items from all of their groups.
- Members may communicate with each other without exposing their email addresses – a desirable feature to some members.

ALA Connect is open to non-members of ALA on a limited basis, to expose the range of work done by the Association to non-members, to encourage participation in ALA and to allow ALA members to expand their influence within the broader profession.

- To avoid spam, there is an imposed delay on activation of new non-member accounts.
- Non-members may not see information about a member – only the member name, profile picture (if the member has uploaded one), and a list of any public posts. No contact information for members is available.
- When a non-member is using Connect, a “Join ALA” option appears on the screen.

An announcement about the site went out to members via email on Tuesday, June 16. In the 10 weeks before the email notice, the site experienced increasing levels of usage by thousands of members. For the period April 6 – June 16, users added the following types of content to the system.

- Users who logged in: 3610 (3196 ALA members and 414 non-ALA members)
- Posts: 406
- Online documents: 265
- Calendar events: 162
- Polls/votes: 25
- Discussions (in forums): 143
- Comments: 761
- New communities created: 81

Initial use strongly indicates (1) that ALA Connect is attracting ALA members who have previously been very active in ALA, and (2) that ALA Connect is attracting non-members who may be recruited to ALA membership. The range of purposes for which informal groups are being formed is instructive:

- Alumni groups from various LIS programs are forming ALA Connect communities.
- Ethnic caucuses are forming communities in ALA Connect.
- Communities are forming to discuss the ALA they want to see in the future.
- Communities are forming to discuss a broad range of professional interests, e.g. the recent formation of groups on oral history programs/collections, green libraries, and positive PR for cataloging (“Cataloging Rules”).
- Communities are forming around LIS education, including a specific course that is open to anyone, including industry vendors and participants who are not registered for the class.
- Communities are being created to easily centralize communication and documents for grant recipients.
- Informal working groups are creating working spaces in Connect for their projects.
- A community was formed to generate interest in creating an official interest group within a division. Enough members expressed interest there that a petition has been submitted.
- ALA affiliates are creating communities for their members and even their boards.

Upcoming features planned for Connect will make the site even more useful for those members not currently active on committees or working groups within the Association.

- By the end of July, a new mentoring network will be integrated into Connect. It will include options for mentoring through existing formal programs (such as ACRL and Spectrum) or informal mentoring. This is one of President Jim Rettig’s initiatives.
- In August, a new “Opportunities Exchange” will be implemented where users will be able to find opportunities to apply for grants, awards, fellowships, volunteer help, and more.
- In Fall 2009, a new search engine will be put in place that will improve overall search but also allow members to find other members with similar interests.
- A new conference event planner will be integrated into Connect that will highlight sessions of interest to members based on the interests expressed in their profiles, allow them to display their schedules to their “friends” in Connect, and (ideally) fill in committee meetings automatically on member schedules.

Virtual Conference Participation:

ACRL began experimenting with Webcasts of its National Conferences in 1999, but its first fully integrated Virtual Conference was offered in 2005. The Virtual Conference not only enhances the conference experience for those attending the face-to-face conference, but also provides an important professional development opportunity to those unable to travel to the conference site. Past Virtual Conferences have provided access to discussion forums, presentation/speaker materials, blogs, and webcasts of selected programs. Starting in 2009, ACRL also provided dynamic screen capture recordings (audio synched with PowerPoints) for 80 sessions offered live in Seattle. ACRL contracts with the vendor LearningTimes to produce and offer the Virtual Conference.

Virtual Conference registration has grown steadily since 2005:

2005 - 80

2007 - 100

2009 - 188 (Total virtual conference participants based on group registrations – 355)

A total of 180 persons also registered for the first-ever PLA Virtual Conference as part of the 2008 PLA National Conference. The two day Virtual Conference featured panel discussions, poster sessions, interactive workshops, and chats with colleagues, all in real-time. Each day consisted of five live programs. Individuals who registered to attend PLA 2008 in Minneapolis also automatically received access to the Virtual Conference as part of their registration.

This July, ALA will offer its first Virtual Conference as part of the Annual Conference in Chicago. The conference will offer ten interactive Web sessions on Monday, July 13 and Tuesday, July 14. Attendees will be able to interact with speakers and other attendees during each of these hour-long sessions on a variety of topics. Interactive programs will be provided by ALA's Washington Office, the Office of Intellectual Freedom and other divisions and offices.

Some of the featured programs are:

- “Conversants” Explore a new way of looking at librarianship as centered on learning and enhancing the conversation of communities.
- “Be My Guest: Customer Service from the Best” Learn ways to make library patrons feel welcome and have a positive experience.
- “You Got Me, Do You Like Me? Evaluating Next Generation Catalogs” A panel of academic and public information professionals will discuss their open source and off-the-shelf next-gen catalogs.
- “Overview of the Broadband Deployment and Infrastructure Development: How Libraries Can Access the \$7.2 Billion”.
- “Small Scale Green” Much attention has been given to sustainable construction projects for new library buildings, but there also are a variety of ways libraries can “green” existing

facilities or undertake small renovation projects to reduce energy consumption and improve air quality.

- “Naked Ladies in the Library! or Public Art in Public Libraries: Building Lasting Alliances and Creating Social Capital” A panel from the San Diego County Library will discuss their ongoing public art program, and its success in creating inclusive communities and new relationships.
- “Learning to Lead” Leadership takes place at all levels and in all types of libraries, but it doesn’t just happen; leadership is a learned skill. Participants will gain real-life lessons on learning to lead; hear varying viewpoints on leadership training and receive valuable resources and materials for learning to lead.

All full registrants to the ALA Conference will have access to these sessions after the conference. Those not attending Conference in-person can register for the Virtual Conference online through the ALA Web site. The cost is \$215 for ALA members, \$210 for division members, \$120 for student members, \$145 for retired members, \$298 for non-members and \$215 for institutional members.

Libraries or schools can also receive the following special group rates: \$300 for one to three employees; \$500 for four to nine employees; and \$1000 for 10-plus employees. For more information or to register online, see <http://ala.org/ala/conferenceevents/reg/index.cfm>.