

**Public Library Association  
Board of Directors Meeting  
ALA Annual Conference  
Saturday, June 28, 2014  
1:00-4:00 PM**

**Location:** Las Vegas Convention Center, Room N219

Logistics: Catering –Lunch will be in the room at 12:30. The open meeting begins at 1:00 pm and continues in the same room until 4 pm or a motion to adjourn.

**Agenda**

*1:00-1:10 pm*

- **Welcome and Introductions, Carolyn Anthony**
- **Action Item:** Adoption of the agenda

Additional items may be added to the agenda prior to the adoption of the agenda. Items may also be removed from the consent agenda and moved to a discussion item. The PLA policies related to Board service, the strategic plan and a Board roster have been included in ALA Connect as reference materials. These are not agenda items.

<b><u>Consent agenda</u></b>	<b><u>Document Number</u></b>
a. 2014 Spring Board Draft Actions	2014.68
b. Awards 2014 Report	2014.69
c. Continuing Education Report	2014.70
d. Committee, TF, Advisory Group Biannual Reports	2014.71
e. Digital Learning Center-IMLS Project Report (DigitalLearn.org)	2014.72
f. Membership Report	2014.73
g. Nominating Committee 2015 Election Slate	2014.74
h. PLA 2014 Report	2014.75
i. PLA 2014 Election Results	2014.76
j. “Public Libraries” Magazine Report	2014.77
k. Publications Report	2014.78
l. Technology Report	2014.79
m. Washington Office Report	2014.80

## Action/Discussion/Decision Items

1:10-1:20 pm

**President's Report, Carolyn Anthony**

*no doc*

1:20-1:50 pm

**PLA Strategic Plan, Discussion, Board**

2014.82/2014.82a

**ACTION.** Adoption of Revised Strategic Plan

1:50-2:00 pm

**Review of PLA Boot Camp Program, Pam Sandlian Smith**

2014.83

2:00-2:15 pm

**Budget and Finance Reports, Clara Bohrer and Barb Macikas**

**Financial Analysis Overview: FY 2014- April 2014**

2014.84

**FY 2014 Year-To-Date by Project Report** thru April 2014

2014.85

**ACTION.** Adoption of the FY2015 Budget,

Budget & Finance Committee Chair, *Clara Bohrer*

2014.86

2:15-2:30 pm

**ALA Executive Board Liaison, Rob Banks**

*no doc*

2:30-2:40 pm

**Review of the ALA Council Agenda.** The purpose of this Agenda is to seek input from the PLA Board prior to Council sessions so that the PLA councilor can adequately and accurately represent PLA's point of view at Council Meetings, *Christine Hage*.

2014.87

2:40-3:00 pm

**E-Rate Update, Carolyn Anthony, all**

2014.88

3:00-3:15 pm

Break

3:15-3:30 pm

*Gates Foundation Update, Deborah Jacob, Director, Global Libraries*

*no doc*

3:30-3:45 pm

**ALA Center for the Future of Libraries, Miguel Figueroa**

2014.89

3:45-3:55 pm

**PLA Emerging Leader Project**, Discussion, Carolyn Anthony and  
Barb Macikas

2014.90

Reminder regarding revision to Fall Board meeting schedule

2014.81 *onsite*

3:55 pm

**Service Recognition of Outgoing Board Members, Carolyn Anthony**  
Eva Poole, Christine Hage, Portia Latalladi, and Georgia Lomax

2014.91 *onsite*

New Business.

Reminder! Join us at the [\*\*PLA President's Program and Awards Ceremony\*\*](#), Sunday, June 29,  
1:00–2:30 PM, Las Vegas Convention Center N249



## DRAFT Minutes

Public Library Association  
Board of Directors Meeting  
Spring Meeting  
1-5 p.m., May 4, 2014  
Washington, D.C.

**Location**

Capitol Hill Hotel  
200 C St. SE,  
Washington, DC 20003

### DRAFT MINUTES (to be approved by the Board at 2014 ALA Annual Conference)

1. Welcome and Introductions.
2. **Approved consent documents:** Draft 2014 Midwinter Board Actions (2014.46);
  - a. Edge Initiative Update 2014.47
  - b. Educational Activities Update 2014.48
  - c. Every Child Ready to Read Report 2014.49
  - d. IMLS Grant Projects-Status Report 2014.50
  - e. Membership Report 2014.51
  - f. PLA 2014 Conference Report 2014.52
  - g. Publications Report 2014.53
  - h. "Public Libraries" Magazine Report 2014.54
  - i. Technology Report 2014.55
  - j. ALA Washington Office Report 2014.56

Documents 2014.46 and 2014.55 were moved to the discussion agenda.

### Action/Discussion agenda

3. **Approved agenda as presented, with corrections to document 2014.46** (adding Melinda Cervantes in attendance and noting Sari Feldman's campaign materials were distributed). A question was raised about document 2014.55-Tech Report. The question was about context for website analytics. Can the Board get comparison data in order to better understand PLA

numbers? Barb Macikas will follow up with staff and report back to the Board via the next PLA Technology Report.

4. **PLA President Update, Carolyn Anthony**, see document 2014.57. Anthony noted she continues to get excellent feedback on the PLA conference and thanked everyone for their good work including conference and program chairs and fellow board members Larry Neal and Georgia Lomax.

There was a discussion about the impact of the conference on PLA membership and whether our membership and conference attendance will fully rebound from pre-recession highs. In a difficult economy, some libraries may determine they can “live without” membership or conference participation. It was also noted that with continuing mergers among vendors, the number of exhibiting companies and the representatives they send is also decreasing. We need to find new ways to engage librarians and demonstrate value. One suggestion related to helping librarians make the case for involvement in PLA was to develop a list of benefits that could be shared with local decision-makers and funding authorities. This idea will be referred to the PLA Membership Advisory Working Group.

Other items reported on by Carolyn Anthony: the PLA Performance Measurement Task Force-- it is hoped pilot test measures will be developed soon. The Gates Foundation is supporting a meeting in Chicago in June to accelerate the process; Carolyn attended the launch of the partnership between ALA/PLA and the Consumer Financial Protection Bureau at the Chicago Federal Reserve Bank and served as a panelist; Larry Neal and Carolyn met at PLA to review plans for presidential transition. It was a successful meeting and they would recommend continuing this practice.

5. **Division Presidents/Online Community, Carolyn Anthony**, see document 2014.58. Carolyn Anthony reviewed the division presidents' discussion related to software to enable better member engagement. It was noted that ALA Connect isn't serving this need. Jay Turner observed that it is less about the specific software tool and more about who champions and nurtures the group. PLA should look at models that work and build on those. The success of the ULC lists was noted. Currently there is no easy way for PLA to create lists for specific groups of library staff (e.g., director list; department head list, tech list, etc.). Anthony will follow up with ALA President Barbara Stripling on possible solutions.

6. **ALA Washington Office E-Rate Presentation**, see document 2014.64. Alan Inouye, Larra Clark and Marijke Visser reviewed the current status of the E-Rate discussions and ALA's positions on E-Rate.

7. **2015 Summit Event discussion, Larry Neal**, see document 2014.59. Neal reviewed the idea of hosting a 1.5 day summit for directors/deputies in non-PLA conference years. This idea began with the PLA CE Advisory Group. All agreed the idea has a lot of potential. A key to its success will be linking it to another non-library conference or gathering, e.g., SxSW, CES, ICMA, etc. PLA staff will review options and report back.

8. **ALA Financial Status Report**, see document 2014.60. There was concern expressed about financial losses over the past several years. PLA structure should reflect its priorities. A balanced budget with long term projections should be developed. Other large organizations such as Rotary have made major structural changes that have had positive impact.

9. **PLA FY2014 Status Report and FY2015 Draft Budget**, see documents 2014.61 and 2014.62. *Barb Macikas* reported on the status of FY 2014 budget. The PLA conference made budget on revenues; expenses are not all in yet but we do not anticipate any major expense overages. The FY 2015 budget is based on last non-conference year budget, with expenses for staff salaries (due to grants that are ending) increasing. Net for FY15 budget is (\$804,043) with an estimated fund balance of \$1,471,619. The FY15 budget may be revised based on the strategic planning session results. The final budget will be prepared and submitted for the Board's approval at the PLA Annual Conference.

During the review of FY 2014 budget status, it was requested that the PLA Bootcamp program be reviewed at the next Board meeting. Staff will prepare a document for the Board's review.

9. **Conference Canvassing Policy**, (see document 2014.66). The Board discussed the background document and the need for a policy. Following discussion it was moved and **approved** that the new policy be accepted as presented: "Canvassing of PLA conference attendees during programs and at the conference venue (outside of the areas approved by PLA for exhibitors) is strictly prohibited. If this activity is encountered, violators will be directed to cease immediately. PLA provides many opportunities for representatives from for-profit and non-profit organizations to make conference attendees aware of their services and products. These include: exhibiting, advertising, sponsoring and as approved by PLA, program planning. For information on participating in PLA Conferences and professional development events, contact the PLA office."

10. **PLA Strategic Planning**, results of Midwinter leadership discussion and next steps, *Pam Sandlian Smith*. Smith reviewed the Board's Fall 2013 discussion where the Board determined that the current PLA strategic plan did not require major revision. Rather the Board would seek out member input and consider a two-three year focus on a few specific areas.

Next, the results of the Midwinter Meeting discussion with PLA leadership were reviewed in the context of the existing plan's goals. Two goal areas resonated especially strongly. Under the "Advocacy and Awareness" goal, how can PLA help support libraries as their roles continue to change and shift? PLA's communication channels would be especially critical here. The Board discussed the idea of hiring outside expertise (and identifying vendor partners) to begin work on a communications strategy to re-position the perception of public libraries. Pam Smith provided the example of the Colorado initiative, "Outside the Lines" (see: <http://getoutsidethelines.org/>) which was created to help shift perceptions.

The second area where there was the greatest energy centered on the Leadership & Transformation goal, specifically on how to position libraries to be conveners of the community conversations; to be community leaders. We are already doing good work in this area though our leadership training and ICMA partnership but we need to continue to develop programs that introduce libraries to their communities as leaders and active influencers. There was also a discussion about how library school

curriculum impacts librarians' knowledge and understanding of this role and how PLA might work to influence library education. Additionally, many libraries are hiring non-MLS staff to manage IT, early literacy, etc.

Related to the other two PLA strategic goals, it was noted that through ECRR and DigitalLearn.org, we are working in the literacy area. Related to the final goal of Organization excellence, it was noted that it will follow if the other three are done. Overall the Board noted there are many on-going initiatives we are continuing.

A subset of the Board consisting of Pam Sandlian Smith, Larry Neal, Portia Latalladi and Carolyn Anthony will meet to develop next steps for the next Board meeting.

**11. Aspen Institute Report-Outs, Felton Thomas and Pam Sandlian Smith.** Thomas and Smith each reported on the status of their respective Aspen working groups. Thomas is participating in the [Aspen Institute Task Force on Learning and the Internet](#). It is a national conversation led by a task force from technology, public policy, education, business and online safety sectors. The Task Force aims to better understand how we can optimize the web to improve learning. A white paper should come out prior to the ALA 2014 Annual Conference. Smith reported on the "[Dialogue on the future of public libraries](#)." A lead takeaway is that it is critical to engage people from outside the library and to ensure that elected leaders understand the role of PL's. There will be a program at the ALA Conference that provides an overview of next steps for both initiatives.

**12. Report on ALA Center for the Future of Libraries Summit, Eva Poole.** Poole attended the Summit convened prior to the Board meeting and reported on that meeting. She noted the new center will be modeled on the existing center for the future of museums. At the Summit, librarians and representatives from organizations that work with libraries met at the Library of Congress to discuss the future of libraries. Participants engaged in conversations about trends in society that libraries will have to address and how librarians might prepare, respond, and lead. The results of the discussion will inform the development of a Center for the Future of Libraries to be initiated by the American Library Association in the spring of 2014. [Here is a final report from the summit.](#)

13. It was agreed to postpone a discussion of the ALA Emerging Leaders program and to add it to the Board's summer agenda.

14. Seeing no new business, the meeting was adjourned at 5:30 pm.

**TO:** PLA Board of Directors  
**FROM:** Julianna Kloepel, Program Coordinator  
**RE:** Awards Report 2014

**PLA Presidents Program and Awards presentation, Sunday June 29, 1 pm, Las Vegas Convention, N249**  
**Center:** <http://www.ala.org/pla/education/alaannual/14presidents>

**Allie Beth Martin Award**

**2014 Recipient: Rollie James Welch, collection manager, Cleveland (Ohio) Public Library**

Honors a librarian who, in a public library setting, has demonstrated extraordinary range and depth of knowledge about books or other library materials and has distinguished ability to share that knowledge. A plaque and a \$3,000 honorarium are presented annually at the ALA Annual Conference. Established in 1977 in honor of Allie Beth Martin. Sponsored by Baker & Taylor. Jury: Susan K. McClelland (chair) Allen-Vogel, Elizabeth A. Guarino, Sandy Wee, Susan Wray, and Denise Anton Wright

**Baker & Taylor Entertainment Audio Music / Video Product Award**

**2014 Recipient: Broadview (Ill.) Public Library District**

Designed to provide a public library the opportunity to build or expand a collection of either or both formats in whatever proportion the library chooses. The grant consists of \$2,500 of Audio Music or Video Products. Sponsored by Baker & Taylor. Jury: Todd Krueger (chair), Erin Gray, Ingrid Kalchthaler, Tor Loney, Sara Pope, Marion N. Scichilone, and Nick Donald Taylor

**Charlie Robinson Award**

No winner was chosen this year. See PLA document 2014.38

Honors a public library director who, over a period of seven (7) years, has been a risk taker, an innovator and/or a change agent in a public library. Jury: Jo Ann Pinder (chair), Skip Auld, Christine E. Lohman, Candelaria Mendoza, Rebecca Rasnic and Greta K. Southard

**Demco New Leaders Travel Grant**

**2014 Recipients: Andrea Hirsh, electronic services/community outreach librarian, Juneau (Alaska) Public Libraries; Zac Paul Matthews, digital services librarian, Everett (Wash.) Public Library; Emery M. Ortiz, assistant director, Onslow County (N.C.) Public Library; and Michelle A. Moore, librarian and director, Missaukee District (Mich.) Library**

Designed to enhance the professional development and improve the expertise of public librarians new to the field by making possible their attendance at major professional development activities. Plaques and travel grants of up to \$1,500 per applicant are presented annually at the ALA Annual Conference. Established in 1993. The name of this grant was changed in October 2004. This grant is sponsored by Demco, Inc. Jury: Felton Thomas, Jr.(chair), Sonia Alcantara-Antoine, Marla J. Ehlers, Jennifer L. Giltrop, Amy Catherine Hanaway, Milly C. Lugo-Rios and De Anza Williams

**EBSCO Excellence in Small and/or Rural Public Library Service Award**

**2014 Recipient: Bertha Voyer Memorial Library, Honey Grove, Texas**

Honors a public library serving a population of 10,000 or less that demonstrates excellence of service to its community as exemplified by an overall service program or a special program of significant accomplishment. A plaque and a \$1,000 honorarium are presented annually at the ALA Annual

Conference. Established in 1991. Sponsored by EBSCO Information Services. Jury: Sara Dallas (chair), Betsy Adamowski, Katherine Kimball Adelberg, Luren E. Dickinson, Tina Irene Hager, Julie Hildebrand and Angelique Denise Simmons

#### **Gordon M. Conable Award**

##### **2014 Recipient: Smithville (Texas) Public Library**

Honors a public library staff member, a library trustee, or a public library, that has demonstrated a commitment to intellectual freedom and the Library Bill of Rights. The award consists of \$1,500 and a plaque to be presented annually at the ALA Annual Conference. Sponsored by LSSI. Jury: Loida A. Garcia-Febo (chair), Robert P. Doyle, Michelle M. Jeske, Cindy A. Lombardo, Neel Parikh and William L. Turner, Jr.

#### **Polaris Innovation in Technology John Iliff Award**

##### **2014 Recipient: Edmonton Public Library, Alberta, Canada**

Honors the life and accomplishments of John Iliff, early adopter and champion of technology in public libraries, and recognizes the contributions of a library worker, librarian, or library that has used technology and innovative thinking as a tool to improve services to public library users. The award provides a \$1,000 honorarium, a plaque and a bouquet of roses for the workplace. Sponsored by Polaris. **Jury:** Susan T. Hayes (chair), Henry Miller Bankhead, Tricia Rake Bengel, Shelley K. Holley, Emmanuel Merenini, and Jill H. Rodriguez

#### **Romance Writers of America Library Grant**

##### **2014 Recipient: Red Wing (Minn.) Public Library**

Designed to provide a public library the opportunity to build or expand its romance fiction collection and/or host romance fiction programming. The grant consists of \$4,500 to be used toward the purchase of books in print and/or audio format, author honorariums and travel expenses, and other applicable program expenses. Sponsored by the Romance Writers of America. Jury: Arlene M. Griffin (chair), Kara A. Kohn, Diane L. Velasquez and Deborah T. Walsh.

#### **Upstart Innovation Award**

##### **2014 Recipient: Terrebonne Parish (La.) Library**

Recognizes a public library's innovative and creative service program to the community. A plaque and a \$2,000 honorarium are presented annually at the ALA Annual Conference. Sponsored by Upstart, a Demco company. Jury: Sydney Leigh McCoy (chair), Vicky L. Baker, Maureen T. Cole, Ashley K. Graves, Monica R. Harris, Jenna Hecker, Valerie Rowe-Jackson, and Manya Danielle Shorr

#### **Public Libraries Feature Article Contest**

**First Place: Jasmina Jusic for the article "[Entrepreneurial Leadership in Public Libraries](#)," July/August 2013 issue**

**Honorable Mention: Nicholas Higgins for the article "[Family Literacy on the Inside](#)," January/February 2013 issue**

Awards cash prizes to the authors of the best feature articles written by public librarians and published in the previous year's issues of *Public Libraries* magazine. Committee: Joanne King (Chair), Loida A. Garcia-Febo, Brian A. Guenther, Kevin A. R. King, Britta Krabill, Portia Eileen Latalladi, Norman L. Maas, Jill Porter, Celise Ann Reech-Harper, Kirstaine A. Smith, John Spears, Nick Donald Taylor, Monique Le Conge Ziesenhenne

June 10, 2014

To: PLA Board of Directors  
From: Linda Bostrom  
Re: Update on Educational Activities

#### **PLA @ ALA 2014 Annual Conference**

PLA is sponsoring 3 half-day preconferences in Las Vegas: "Beyond Glitz and Glitter: Great Brands Start from Within," "Creating a Collaborative Culture," and "Stepping Into the Director Role: Preparing for the Part." All are scheduled on Friday morning, June 27, 8:30am-Noon. A schedule of the PLA-sponsored programs and business meetings, with times and room locations, can be found on the PLA web site at this URL: <http://www.ala.org/pla/education/alaannual>.

The call for proposals for the 2015 ALA Annual Conference (June 25-30, San Francisco) is just underway. Instructions and a link to the proposal form can be found on this page <http://www.ala.org/pla/education/alaannual/proposal>.

#### **Online Education**

A session of the four-week class, How to Win Grants for Your Library, recently ended. Forty-eight students participated with registration income of \$7,642. Registration for "The Accidental Public Library Technology Trainer," which is scheduled September 8-October 3, recently opened. The class can accommodate 50 students.

Webinars presented since January 1, 2014:

Date	Title	Attendance/Income
Jan.-Feb .	Development and Fundraising series (3 webinars )	53 ind./12 groups - \$5,549
Mar.-April	Supervise with Success (2-part webinar)	59 ind./25 groups - \$7,470
April 30	What Makes a Great Library Website	70 ind./9 groups - \$3,334
May 14	Violence Prevention in the Public Library	26 ind./30 groups - \$4,647

Upcoming webinars include a single session titled "Marketing Plans for the Faint of Heart" being presented by Christine Cigler on June 23, and a session on tips for conducting an annual campaign yet to be scheduled.

#### **Results Boot Camp 2014**

Applications for this management training class led by June Garcia and Sandra Nelson are still being accepted. The class needs about 55 participants for income to exceed expenditures and we currently have 48. We will continue to accept applications as long as space is available. We can accommodate up to 70. The class is scheduled to take place August 4-8 in Nashville, hosted once again by the Nashville Public Library.



**TO:** PLA Board of Directors

**FROM:** Barbara Macikas, Executive Director

**RE:** **Reports from PLA committees, advisory groups and task forces**

**DATE:** June 12, 2014

Following discussions with PLA President Carolyn Anthony and President-elect Larry Neal related to PLA committee work, staff implemented a new process to collect status reports from our committees and working groups. We have revised the reporting process so that the committee/work group reports will become part of the Board consent agenda at each ALA Annual Conference and Midwinter Meeting. This will ensure that the Board has an opportunity to review the work of the committees. It is also hoped that this will increase the number of committee reports we receive as the previous process did not result in consistent reporting.

PLA will also post these reports to the respective committee's site on ALA Connect so it will be available for the committee's reference as well. We asked chairs to provide a report that is high level and provides a brief overview and indicated it does not need to be nor is it intended to be an exhaustive list of activities. Instructions and form are [here](#). Certain committees are excused from this process. These include award juries as well as the PLA Budget and Finance Committee.

The following represent the reports we have received as of today's date.

**Annual Conference Program Subcommittee (2014), Chair, Richard Kong**

Staff liaison (if applicable): Linda Bostrom

Date submitted: 05/21/2014 This report represents work done December–May.

**Please provide key accomplishments since last report to the Board:** The committee members reviewed and rated program proposals in October 2013. Three preconference proposals and sixteen program proposals were chosen. During ALA Midwinter 2014, committee members met to further discuss the program and volunteer to introduce specific programs.

**Please list key accomplishments planned for the balance of the year:** Committee members will introduce some of the PLA-sponsored programs during ALA Annual 2014.

**Does the group have any specific policy recommendations to the Board and/or recommendations or ideas with financial impact for PLA?:** No

**Describe (briefly) how your group's work is tied to a specific goal/objective of the PLA Strategic Plan:** Programs selected for the ALA Annual 2014 Conference will help achieve the goal related to leadership and transformation by offering training opportunities for public librarians. Also, the preconferences and programs selected will help achieve organizational excellence by providing greater opportunities for member engagement.

**Do you have any suggestions for future products or resources (excluding conference programs) to be developed based on your group's work?:** No

**Are there other PLA/ALA committees your group might collaborate with to benefit the work of all?:** Insights and ideas shared by other committees, including the PLA National Conference program subcommittee, would help the work of the ALA Annual Conference program subcommittee. A closer tie to other ALA committees involved with the Annual Conference would also help provide direction to the committee.

**Have there been any issues related to meeting participation/attendance for any of the group's members?  
Yes/No (if yes, PLA will contact you for more information):** No

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**Continuing Education Advisory Group, Chair, Sonia Alcantara-Antoine**

Staff liaison (if applicable): Linda Bostrom

Date submitted: 06/09/2014 This report represents work done December–May.

**Please provide key accomplishments since last report to the Board:** At Midwinter, the group brainstormed on a Directors' Summit - training for executive and manager-level library staff that would feature non-library industry leaders. Library directors are saturated with information from the library world - why not learn from the best and brightest leaders in the nonprofit and corporate worlds? Some committee members have gotten the ball rolling on this idea since Midwinter.

**Please list key accomplishments planned for the balance of the year:** In addition to advising PLA's Continuing Education staff, we will focus on targeting speakers for the Directors' Summit and fleshing out the details.

**Does the group have any specific policy recommendations to the Board and/or recommendations or ideas with financial impact for PLA?:** N/A

**Describe (briefly) how your group's work is tied to a specific goal/objective of the PLA Strategic Plan:** Goal: Leadership & Transformation. Objective (1): Increase leadership development and training opportunities designed to support the ongoing transformation of public libraries.

It's our hope that a Directors' Summit could help give public library leaders an advantage when advocating for their libraries. We do a great job of learning from each other, but there could be something gained by looking at leadership examples from outside the library world.

**Do you have any suggestions for future products or resources (excluding conference programs) to be developed based on your group's work?:** A Directors' Summit. The committee has yet to determine the format - webinar, mini conference, or preconference - but the idea is for this to be a recurring event potentially tied to major nonprofits or corporations based in the host city where ALA/PLA Conference is taking place. For example, a Directors' Summit at PLA Conference in Indianapolis could have featured from Eli Lilly or Indianapolis 500 to share how they are handling recruitment, marketing, succession planning, demonstrating value to stakeholders, or any number of issues that are faced by all types leaders.

**Are there other PLA/ALA committees your group might collaborate with to benefit the work of all?:** N/A

**Have there been any issues related to meeting participation/attendance for any of the group's members?**

**Yes/No (if yes, PLA will contact you for more information):** No

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**Every Child Ready to Read Oversight Committee, Chair, Kathleen Reif**

Staff liaison (if applicable):

Date submitted: 05/28/2014 This report represents work done December–May.

**Please provide key accomplishments since last report to the Board:** PLA National Conference: 2 pre-conferences and 2 programs which were well received

Finalized program for 2014 Annual Conference: Using Apps & ebooks in Early Literacy Programs

Submitted ALSC form to create a webinar on the Spanish version

Born to Read info has been put on the NING

ECRR 2 won the Opening Minds Innovation Award at the Chicago Metro NAEYC regional conference

PLA Exec Director is working with two members on creating an ECRR module for Childcare Providers

Based on feedback from ECRR customers, we will not pursue the project to create PSAs

**Please list key accomplishments planned for the balance of the year:** Committee will meet at ALA 2014 conference. Some of the topics to be discussed: program suggestions for 2015 Conference, status of webinar on Spanish version; suggestions for future webinars; status of Childcare Provider module; results of ECRR 2 Customers survey; update on IMLS grant.

**Does the group have any specific policy recommendations to the Board and/or recommendations or ideas with financial impact for PLA?:** Not at this time.

**Describe (briefly) how your group's work is tied to a specific goal/objective of the PLA Strategic Plan:** This committee's work supports the Advocacy & Awareness goal by providing libraries with a valuable resource (ECRR@ your library) to enhance public awareness of public libraries and it supports the Literate Nation goal by providing information about the importance of early literacy activities and library services to young children.

**Do you have any suggestions for future products or resources (excluding conference programs) to be developed based on your group's work?:** Childcare provider module

webinars for staff training

**Are there other PLA/ALA committees your group might collaborate with to benefit the work of all?:** (not to exceed 200 words)

**Have there been any issues related to meeting participation/attendance for any of the group's members?  
Yes/No (if yes, PLA will contact you for more information):** No

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**Intellectual Freedom Committee, Chair, Robert Hubsher**

Staff liaison (if applicable):

Date submitted: 06/09/2014 This report represents work done December–May.

**Please provide key accomplishments since last report to the Board:** At the Mid-Winter Meeting we reviewed the various resolutions and/or issues that were scheduled to be or were discussed at the ALA IFC and FTRF meetings. The PLA IFC Committee members asked questions and/or made suggestions to be taken back to future Committee meetings. We discussed our disappointment that the proposed session for the PLA Conference was not accepted. We discussed the possibility of proposing webinar-based training on intellectual freedom (IF) topics - Trustee responsibilities for IF, privacy issues related to software and apps as well as integrated library systems (ILS).

**Please list key accomplishments planned for the balance of the year:** The intent is to pursue these training ideas during the remainder of the year.

**Does the group have any specific policy recommendations to the Board and/or recommendations or ideas with financial impact for PLA?:** (not to exceed 200 words)

**Describe (briefly) how your group's work is tied to a specific goal/objective of the PLA Strategic Plan:** (not to exceed 200 words)

**Do you have any suggestions for future products or resources (excluding conference programs) to be developed based on your group's work?:** Training sessions - Trustee responsibility regarding protecting and nurturing intellectual freedom; staff training regarding privacy and confidentiality; the library's role in educating patrons about privacy issues; understanding the threat to privacy posed by apps and third party products.

**Are there other PLA/ALA committees your group might collaborate with to benefit the work of all?:** (not to exceed 200 words)

**Have there been any issues related to meeting participation/attendance for any of the group's members?  
Yes/No (if yes, PLA will contact you for more information):** No

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**Leadership Development Committee, Chair, Karen Danczak Lyons**

Staff liaison (if applicable): Melissa Faubel Johnson

Date submitted: 06/09/2014 This report represents work done December–May.

**Please provide key accomplishments since last report to the Board:** The Leadership Development Committee produced a successful Preconference at the PLA 2014 Conference in Indianapolis: "Creating and Sustaining A Culture of Innovation." The presenter, Paul Meyer provided an engaging and thought provoking session which energized the participants. While providing interesting ways to think about innovation during the preconference, participants left with strategies and examples of exercises that will engage their staff and Boards at home. Special thanks to Audra Caplan who organized the preconference and the members of the committee who acted as facilitators during the session.

**Please list key accomplishments planned for the balance of the year:** At annual conference we are sponsoring "The Strategic Plan is Dead; Long Live Strategy" on Saturday, June 28th. When considering leadership development activities, how to create strategy and the role of strategic planning are important topics. Special thanks to Jay Turner who brought this idea forward.

We are also excited to report that our IMLS Laura Bush 21st Century Librarian grant proposal has been approved. Through the funding provided, and with the support of the wonderful PLA staff, the Leadership Development Committee will produce two more sessions of the PLA Leadership Academy - in Spring of 2015 and 2017. "Navigating Change, Building Community: Outward-focused Public Library Leadership Training" is presented in partnership with ICMA.

**Does the group have any specific policy recommendations to the Board and/or recommendations or ideas with financial impact for PLA?:** Support for "Navigating Change, Building Community: Outward-focused Public Library Leadership Training" which requires the support and leadership of Barb Macikas and talented PLA team.

**Describe (briefly) how your group's work is tied to a specific goal/objective of the PLA Strategic Plan:** The work of the Leadership Development Committee directly supports the Leadership & Transformation goal and the first two objectives listed below through the production of programs at ALA and PLA Conferences and the production of the Leadership Academies detailed above. Goal Statement: PLA is the leading source for learning opportunities to advance transformation of public libraries. Objective (1): Increase leadership development and training opportunities designed to support the ongoing transformation of public libraries. Objective (2): Increase opportunities to share best practices and next practices in public libraries.

**Do you have any suggestions for future products or resources (excluding conference programs) to be developed based on your group's work?:** As work on the "Navigating Change, Building Community: Outward-focused Public Library Leadership Training" proceeds over the next few years, opportunities for the participants to reconnect, act as resources to each other and provide programs should be planned and produced.

**Are there other PLA/ALA committees your group might collaborate with to benefit the work of all?:** We will continue to look for opportunities to provide programs for the various Conference Committees. In addition we could work with the Continuing Education and Advocacy committees as these areas are important for the development of leaders.

**Have there been any issues related to meeting participation/attendance for any of the group's members?  
Yes/No (if yes, PLA will contact you for more information):** No

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**Committee: Legislation and Advocacy Committee, Chair, Jan Sanders**

Staff liaison (if applicable): Barb Macikas

Date submitted: 05/23/2014 This report represents work done December–May .

**Please provide key accomplishments since last report to the Board:** (Our primary work during this time was an information session during the all-committee time at MW. Members shared highlights of the legislative work in their respective states. All were encouraged to attend National Library Legislative Day in May in DC, Chairman Sanders is also part of the ALA Grassroots and Advocacy groups and shared the need for solid communication with policy makers within the states. At AC, June, we will take up the e-rate issue and begin conversing about LSTA reenactment.

**Please list key accomplishments planned for the balance of the year:** We will meet again at Annual Conference and develop a plan to participate in and keep members informed re: the renewal of LSTA funding and the revisions likely in E Rate.

**Does the group have any specific policy recommendations to the Board and/or recommendations or ideas with financial impact for PLA?:** None at this time.

**Describe (briefly) how your group's work is tied to a specific goal/objective of the PLA Strategic Plan:** Our charge is to maintain strong communication between members, state affiliations, and the ALA Washington Office so that PLA members can be advised and current on legislative issues.

**Do you have any suggestions for future products or resources (excluding conference programs) to be developed based on your group's work?:** none at this itme.

**Are there other PLA/ALA committees your group might collaborate with to benefit the work of all?:** We currently work with the advocacy group and the grassroots groups to keep informed. We also maintain constant contact with the ALA WO

**Have there been any issues related to meeting participation/attendance for any of the group's members?**

**Yes/No (if yes, PLA will contact you for more information):** Yes (if yes, PLA will contact you for more information)

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**Membership Advisory Group, Chair, Manya Shorr**

Staff liaison (if applicable): Amy Sargent

Date submitted: 06/02/2014 This report represents work done December–May.

**Please provide key accomplishments since last report to the Board:** The committee hosted an Ask Me Anything session on Reddit to give library staff around the world an opportunity to ask a public library director anything and have that director answer honestly and anonymously. Also, since the session happened throughout the PLA conference, it engaged conference participants as well.

**Please list key accomplishments planned for the balance of the year:** None, since current chair's term ends at the end of June.

**Does the group have any specific policy recommendations to the Board and/or recommendations or ideas with financial impact for PLA?:** (not to exceed 200 words)

**Describe (briefly) how your group's work is tied to a specific goal/objective of the PLA Strategic Plan:** The group tries to help public library staff to join PLA. Without that, PLA cannot implement the strategic plan.

**Do you have any suggestions for future products or resources (excluding conference programs) to be developed based on your group's work?:** (not to exceed 200 words)

**Are there other PLA/ALA committees your group might collaborate with to benefit the work of all?:** (not to exceed 200 words)

**Have there been any issues related to meeting participation/attendance for any of the group's members?  
Yes/No (if yes, PLA will contact you for more information):** No

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**Committee: Performance Measurement Task Force, Chair, Denise M. Davis**

Staff liaison (if applicable): Barb Macikas, Mary Hirsh

Date submitted: 05/21/2014 This report represents work done December–May.

**Please provide key accomplishments since last report to the Board:** Convened Task Force Group 1 members at ALA Midwinter in Philadelphia and strategized questions for the PLDS to establish awareness/interest that resulted in a series of 12 PM categories. Fielded via PLDS in Spring 2014. Convened meeting at PLA2014, reviewed preliminary results from the PLDS and refined performance measure categories. The TF received detailed written reports (posted on Connect) from Joe Matthews on the preliminary results from PLDS special section on Performance Measures. Identified as most important were: Early Childhood Literacy, Digital Access, Use of Library Materials, and Community Engagement. TF members developed a framework for building out PMs and experimented with few measures to determine if the framework and assumption were valid. Matthews continued with follow-up contact with libraries reporting they collected performance measures. Summary report was reviewed by the TF Executive Team in early May 2014.

**Please list key accomplishments planned for the balance of the year:** TF Executive Team worked on building out two performance measures based on the work completed at the March PLA meeting. Examples will be ready for review at a 2-day convening of the TF June 20-21, 2014 in Chicago (prior to ALA Annual Conference). The purpose of this convening is to maintain the momentum of the group and to isolate 2-3 test measure for in-depth evaluation within the public library community. TF Executive Team will meet June 30, 2014 at ALA to review project goals/objectives and timeline.

**Does the group have any specific policy recommendations to the Board and/or recommendations or ideas with financial impact for PLA?:** Not at this time.

**Describe (briefly) how your group's work is tied to a specific goal/objective of the PLA Strategic Plan:**

Performance Measures TF efforts align with the following goals: Goal: Advocacy & Awareness; Objective (3): Drive participation in all levels (federal, state, local) of public library advocacy. Objective (4): Enhance public awareness of public libraries. Goal: Leadership & Transformation: Objective (1): Increase leadership development and training opportunities designed to support the ongoing transformation of public libraries. Objective (2): Increase opportunities to share best practices and next practices in public libraries. Objective (3): Advance the use of new and emerging technologies in public libraries. Goal: Literate Nation, Objective (1): Increase awareness of the many types of literacy necessary for success. Objective (2): Enhance public libraries' abilities to provide literacy services in their communities. Objective (3): Expand PLA toolbox(es) for local literacy efforts.

**Do you have any suggestions for future products or resources (excluding conference programs) to be developed based on your group's work?:** Not at this time.

**Are there other PLA/ALA committees your group might collaborate with to benefit the work of all?:** PLDS (already working with)

**Have there been any issues related to meeting participation/attendance for any of the group's members?  
Yes/No (if yes, PLA will contact you for more information):** No

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**Committee: PLDS Statistical Report Advisory Committee, Chair, Kristin Whitehair**

Staff liaison (if applicable): Kathleen Hughes

Date submitted: 05/29/2014 This report represents work done December–May.

**Please provide key accomplishments since last report to the Board:** Established a new arrangement with Counting Opinions to ensure continued access to PLDS data.

Approved suggested changes to the PLDS survey at the ALA Midwinter committee meeting.

**Please list key accomplishments planned for the balance of the year:** In light of work by the Performance Measurement Task Force the committee plans a one year hiatus after the ALA Annual meeting

**Does the group have any specific policy recommendations to the Board and/or recommendations or ideas with financial impact for PLA?:** None.

**Describe (briefly) how your group's work is tied to a specific goal/objective of the PLA Strategic Plan:** PLDS' work is tied to the strategic goal of creating a literate nation. Through better measurement and assessment organizations can improve performance to become more effective in reaching this goal.

Additionally, the work of the PLDS committee's work contributes toward the goal of leadership and transformation. By assessing past performance organizations can set goals and track success. The PLDS is a key tool in doing this.

**Do you have any suggestions for future products or resources (excluding conference programs) to be developed based on your group's work?:** None.

**Are there other PLA/ALA committees your group might collaborate with to benefit the work of all?:** Denise Davis has served as a valuable link to the Performance Measurement Task Force. Coordination with Denise and Kathleen Hughes is highly beneficial.

**Have there been any issues related to meeting participation/attendance for any of the group's members?  
Yes/No (if yes, PLA will contact you for more information):** No

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**Committee: Public Libraries Advisory Committee, Chair, Joanne King**

Staff liaison (if applicable): Kathleen Hughes

Date submitted: 06/09/2014 This report represents work done December–May.

**Please provide key accomplishments since last report to the Board:** Committee met at mid-winter. We chose an article from the previous year's "Public Libraries" to receive the writer's award (to encourage peer-reviewed submissions. We gave suggestions about making online and magazine-format content more relevant to the public library community. We discussed making the issues more graphically interesting through the use of photos.

**Please list key accomplishments planned for the balance of the year:** We will establish themes for issues for the coming year. We will continue to discuss new features and new column ideas.

**Does the group have any specific policy recommendations to the Board and/or recommendations or ideas with financial impact for PLA?:** Some ideas were discussed that would increase advertising revenues, although none were definitive.

**Describe (briefly) how your group's work is tied to a specific goal/objective of the PLA Strategic Plan:** "Public Libraries" and "PLOnline" are main communications vehicles for the organization. As such, our objectives are closely tied to Leadership and Transformation Objectives 1,2 and 3 and also Organizational Excellence, Objective 3.

**Do you have any suggestions for future products or resources (excluding conference programs) to be developed based on your group's work?:** not at this time

**Are there other PLA/ALA committees your group might collaborate with to benefit the work of all?:** Our work is tied closely with ALA's Public Awareness Committee.

**Have there been any issues related to meeting participation/attendance for any of the group's members?  
Yes/No (if yes, PLA will contact you for more information):** No

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**Committee: Technology Committee, Chair, Brian Auger**

Staff liaison (if applicable): Steven Hofmann

Date submitted: 06/09/2014 This report represents work done December–May or May–November (select one): December–May

**Please provide key accomplishments since last report to the Board:** We met at 2014 ALA Midwinter and began program planning, discussed article ideas for Public Libraries Online; completed plans for a PLA program at the 2014 ALA annual.

**Please list key accomplishments planned for the balance of the year:** We will deliver a program on using customer-facing Linux desktops at 2014 ALA Annual and meet to plan additional programs and ideas for Public Libraries Online.

**Does the group have any specific policy recommendations to the Board and/or recommendations or ideas with financial impact for PLA?:** (not to exceed 200 words)

**Describe (briefly) how your group's work is tied to a specific goal/objective of the PLA Strategic Plan:** Our charge is: to help public libraries use technology to improve services; to consider the impacts and opportunities presented by technology; to collect and disseminate information on technology innovation which might be applied in public library operations; to provide channels of communication for sharing among public librarians about technology; and to work with PLA Board and staff toward achieving PLA strategic planning goals as they relate to the use and impact of technology in public library services. As such, we support PLA's strategic plan goals of excellence and innovation.

**Do you have any suggestions for future products or resources (excluding conference programs) to be developed based on your group's work?:** Not at this time.

**Are there other PLA/ALA committees your group might collaborate with to benefit the work of all?:**  
Performance Measurement, Annual Conference Program Subcommittee

**Have there been any issues related to meeting participation/attendance for any of the group's members?  
Yes/No (if yes, PLA will contact you for more information):** No

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**Committee: PLA 2014 Conference Local Arrangements Subcommittee, Chair, Jackie Nytes**

Staff liaison (if applicable): Melissa Faubel Johnson

Date submitted: 06/17/2014 This report represents work done: December–May

**Please provide key accomplishments since last report to the Board:**

The Local Arrangements Committee was comprised of 25 representatives of libraries from Central Indiana who subsequently recruited another 150 volunteers to assist in delivering a successful PLA Conference here in Indianapolis. Our "Hoosier Hospitality" extended from pre visit PR to acquaint visitors with the city, arranging for airport greeters and Dine Around Hosts, and encouraging visitors to explore our city while sharing time with their library friends. We obtained funding for an "Indy Trolley" to assist PLA attendees in visiting area libraries, and worked with the Visit Indy team to make our guests feel welcomed and celebrated!

Please list key accomplishments planned for the balance of the year:

Not aware of additional work needed form us!

**Does the group have any specific policy recommendations to the Board and/or recommendations or ideas with financial impact for PLA?**

We urge the use of the airport greeters, we feel this makes an important first impression on PLA guests; that and our Trolley were ideas people seemed skeptical about but were of value once they were in play. Please don't underestimate your hotel needs, this factor did the most to give a bad impression about Indianapolis and we felt badly about it. We can host a Superbowl so we could have had enough rooms if there had been better estimates.

**Describe (briefly) how your group's work is tied to a specific goal/objective of the PLA Strategic Plan:**

We were thrilled to have PLA here in Indianapolis and hope that PLA leadership was pleased with the result, in terms of the quality of the conference experience and the number of participants.

**Do you have any suggestions for future products or resources (excluding conference programs) to be developed based on your group's work?**

We have some good multi type cooperation going on here with the public library as a partner and that may be of interest for some future programming;

**Are there other PLA/ALA committees your group might collaborate with to benefit the work of all?**

We look forward to hosting an ALA in the future, and would be happy to assist as a site for leadership meetings or other gatherings.

**Have there been any issues related to meeting participation/attendance for any of the group's members?**

No

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**TO: PLA Board of Directors**

**RE: Digital Learning Center-IMLS Project Report**

**ACTION REQUESTED/INFORMATION/REPORT: Report**

**ACTION REQUESTED BY:** **Jamie Hollier, Digital Learning Center Project Manager**

**DRAFT OF MOTION: N/A**

**DATE:** **05/31/14**

**BACKGROUND:**

DigitalLearn.org

IMLS awarded PLA a \$465,475 grant in September 2012 that will conclude in August 2014. Over the two years of the grant period, PLA has developed an online resource center of relevant materials, created new training and awareness templates, created mechanisms for assessment and evaluation, and engaged librarians and other practitioners in expanding and using these materials. The website, [www.digitallearn.org](http://www.digitallearn.org) is live, with a beta site live on March 18, 2013 and the full site on June 30, 2013. We are continuing to improve and enhance content.

Instruction and awareness activities have been held online and in-person. In the past we have presented about the site at the ALA conferences, the ARSL conference, Internet Librarian, SHLB Conference, etc. We have done online presentations for the National Telecommunications and Information Administration (NTIA), the Public Access Technology Community (PAT-C, state library representatives) and Webjunction. Most recently, Jamie Hollier traveled to Alaska and Arizona to do in person trainings for those states about DigitalLearn.org and has seen high levels of use and engagement from those states.

We have had almost 8,000 class completions online since March 18, 2013, well above our goal of 1,000 training lessons in the first year of operation. We are currently working on posting Spanish language versions of the classes, with the first one going live before ALA Annual in Las Vegas.

The Community of Practice launched in June 2013 and so far has over 9,000 members and over 250 unique posts, including events, questions, best practices, resources, etc. We are working to continue to grow this audience through outreach and inbound marketing efforts in addition to leveraging interns and project staff to engage the existing audience and offer additional resources and discussion points to grow the conversation online and increase participation. We also send out a weekly newsletter weekly that has over 200 opens on average.

Surveys for evaluation and future planning have begun to be utilized. Our current survey branches out people that are learners and teachers to get unique information from each group.

Some of the feedback we have received on this site:

From teachers:

"Thank you so much for this valuable resource!!"

"When I started a new position recently, I met with my new supervisor to go over technology training ideas. As we traded our favorite resources, DigitalLearn.org came up right away. It almost went without saying that we both knew about it!"

From learners:

"My feedback on the classes or the site is, for every one involve from top to bottom: Thank you. You are giving us the best gift one could ever receive. Free Education. Which is a key that can open any door in life. May God Bless you."

"Very impressive, a great learning/teaching site."

Some of the organizations using the site include the government organizations (such as the San Francisco Department of Aging), many school districts, community colleges, non-profits, etc. in addition to public libraries,

We are starting to work on transferring the management of the site to PLA since Jamie Hollier's funding sunsets in the fall of 2014.

For FY15, PLA will support DigitalLearn.org. We have plans to submit a proposal to IMLS for another grant to offset some of these costs and expand the project, with an emphasis on mobile devices and courses in new languages. Additionally, Jamie has been meeting with a diversity of possible funders to discuss further support of DigitalLearn.org.

Date: June 9, 2014  
To: PLA Board of Directors  
From: Amy Sargent, Manager of Marketing and Communications  
Re: Membership Report

## Overview

As of May 2014, PLA membership was 9,148, which reflects a 6.25% increase over May 2013 numbers; however is more than 250 less than February 2014 numbers. This is evidence of the chronic affect (both good and bad) of PLA Conference on membership. It seems that in the recent non-conference year the slide has been greater than in previous non-conference years—more like a one step forward, two steps backwards result. Membership efforts in the next several months must be focused on reducing the non-conference year bleed in membership.

ALA membership is currently 56,637, a -1.16 percent shift from May 2013 (57,303). ALA's membership has dropped by 989 members since February 2014.

## PLA Membership Numbers by Type

- Personal: 8,738
  - Regular: 6,544
  - Student: 604
  - Trustee: 384
  - Support Staff: 203
  - Retired: 109
  - Non-salaried: 377
- International: 129
- Other: 388
- Organization: 386
- Corporate: 24

## Division Membership Comparison (As of May 2014)

These numbers reflect the total membership for each division. Percentage reflects percentage increase or decrease from May 2013.

AASL	7,393 (+4.78%)	LITA	2,946 (-5.85%)
ACRL	11,249 (-7.08%)	LLAMA	3,803 (-5.84%)
ALCTS	3,707 (-4.31%)	RUSA	3,526 (-7.72%)
ALSC	4,012 (+3.11%)	UNITED	1,201 (-4.00%)
ASCLA	778 (-2.14%)	YALSA	5,129 (-.29%)

### **Membership Considerations**

In considering the cycle of membership from conference to non-conference years, it seems that primary efforts should be on retaining members and reducing the number of dropped memberships (a bird in the hand....). Here are some potential reasons for dropped memberships with possible communication activities to address them:

**Cost of membership:** This is one of the primary reasons for dropping. And while, we unfortunately cannot reduce the amount of membership dues, we can help members find a way to ease the financial burden.

- Promote the installment pay option. Many members don't know that they can break their payments up into two installments. PLA renewal reminders and dropped messaging now encourage members to take advantage of this if the cost of membership is a deterrent.
- This is an effort in data mining, therefore may be tricky within ALA's iMIS environment, but there may be the possibility of promoting a prorated, half-year PLA membership to ALA members at the 6-month mark. This could target dropped PLA members as a way to bring them back into the association.
- Per the Board's recommendation, the PLA Membership Advisory Group will identify talking points to help members demonstrate the value of belonging to a professional association and ask for support for participation from their city or board.

**Relevance of membership:** We continue to collect new member surveys, which indicate that the top two reasons for joining are "staying up-to-date on the latest issues and trends affecting the profession" and "professional development opportunities."

- Continue to enhance e-news content with more valuable and useful information
- Promote publiclibrariesonline.org as a key product of PLA
- Expand professional development offerings, especially to different member groups – support staff, students
- Find ways to pull member data that allows for more targeted communications
- Create a student member E-News that includes information on jobs, resume-work, other student relevant info.
- Possibility of a PLA Alumni Society for retired members (recommended by Larry Neal) to capitalize on goodwill towards PLA but to be reflective of changing needs of these members.

**Feeling Valued:** While feedback to ALA indicates that many members feel overwhelmed by the variety of communications, it's also important that they feel recognized and valued by the organizations. Some of these ideas could overlap with "relevance of membership."

- Improve consistency of Board letters to members

- Consider adding an email communication from a member of the membership advisory group – colleague to colleague.

### **Current PLA Connections**

PLA reaches out to members and nonmembers alike in a variety of media to deliver benefits or introduce/reinforce the value of PLA membership.

- Facebook (8,382 fans)
- Twitter (8,110 followers)
- Monthly E-News
- *Public Libraries*
- [www.publiclibrariesonline.org](http://www.publiclibrariesonline.org)
- [www.pla.org](http://www.pla.org)
- New member e-mail campaigns within week of joining, renewing, reinstating
  - Welcome letters designed to show appreciation and highlight valuable benefits and membership. Also includes survey.
- Dropped member e-mails with “why did you drop” survey
- Thank you e-mails to renewed and reinstated members
- Reminder e-mails to members due for renew
- Assorted e-mail blasts (one-two a month)
  - Webinars
  - Other professional development
  - New publications
- Boot Camp Results Workshop, Aug 1-4, 2014
- Monthly Webinar Series “Public Libraries at Work”
- National Meetings – PLA Conference, Virtual Spring Symposium, ALA Annual Conference, ALA Midwinter



**TO:** PLA Board of Directors

**FROM:** Eva D. Poole, Chair, Nominating Committee (2015 election)

**RE:** 2015 PLA Election Slate

**DATE:** June 9, 2014

2015 Slate, serving terms from 2015-2018

President:

Gary Shaffer – Director, Tulsa City-County Library

Felton Thomas – Director, Cleveland Public Library

Board (four candidates for two seats on the board):

Brian Auger – Director, Somerset (NJ) County Library

Dr. Rhea Lawson – Director, Houston (TX) Public Library

Gina Millsap – CEO, Topeka & Shawnee (KS) County Library

Skye Patrick – Director, Broward County (FL) Libraries

I am very pleased with the work of my committee and thank each one for their work in bringing forward this excellent slate of candidates.

Committee:

Eva D. Poole (chair), Stephanie Chase, Gregory P. Mickells, Kenton L. Oliver, Matthew Keron Poland and Marcia A. Warner



DATE: June 9, 2014  
TO: PLA Board of Directors  
FROM: Larry Neal, 2014 Conference Chair  
Melissa Faubel Johnson, Conference Manager  
Linda Bostrom, Manager, Professional Development  
Kathleen Hughes, Manager of Publications  
RE: PLA 2014 Conference Report

With the hard work and support of the Conference Committee, Program and Local Arrangements subcommittees, and the PLA staff, PLA 2014 in Indianapolis, was a huge success. The following report will address final numbers, financial figures and evaluation results.

### **Registration**

In Indianapolis, 7,662 librarians, exhibitors, speakers, guests and others attended PLA 2014. This compares to 8,707 in attendance at the 2012 Conference in Philadelphia. There was a slight decline in overall attendee registration (4,837 in 2014 vs. 4,992 in 2012), with a larger gap in the number of exhibitor representatives (1,976 in 2014 vs. 2,425 in 2012).

PLA continues to draw the highest attendance of any of the ALA divisional conferences.

### **Financial Status**

These figures are preliminary and subject to revision.

<b>2014 Revenues Actual as of April</b>	<b>2014 Revenues (Budget)</b>	<b>2012 Revenues Actual</b>
\$3,287,991	\$2,909,205	\$3,060,343
<b>2014 Expenses Actual as of April</b>	<b>2014 Expenses (Budget)</b>	<b>2012 Expenses Actual</b>
\$1,927,766	\$1,988,919	\$1,988,516
<b>2014 Net as of April</b>	<b>2014 Net (Budget)</b>	<b>2012 Net Actual</b>
\$1,360,225	\$920,286	\$1,071,827

Final net will be available when ALA closes the fiscal year, likely in October.

PLA paid an estimated \$729,036 in overhead to ALA for the 2014 conference. This compares to \$732,283 paid for the 2012 conference.

## Programming

### *PRECONFERENCES*

Twelve preconferences were held in Indianapolis. PLA sponsored nine of them, including a by-application event on leadership, and a free one featuring Turning the Page 2.0 and Geek the Library. Two half-day events were sponsored by the Indiana Library Federation and one was sponsored by the ALA Public Programs Office. Total attendance for all preconferences was 894, 807 of whom paid a fee. This compares with 11 events, 742 total attendance/665 paid in Philadelphia, and 13 events, 968 total attendance/888 paid in Portland.

### *PROGRAMS and CONVERSTATIONS*

The Indiana Convention Center offered a very attendee-friendly floor plan, with most program rooms located in one two-level area which was adjacent to the exhibit hall and general session room. A total of 105 concurrent program sessions and 44 ConverStations were scheduled.

In the past, program rooms were uniformly set in theater-style and ConverStation rooms in banquet rounds. For this conference we experimented with having some of the program rooms set in banquet rounds so they could be used for smaller programs and larger ConverStations, “smaller” and “larger” being based on the results of the Session Preference Survey. (Note: ConverStations were included in the Session Preference Survey for the first time this year. Survey results are used in assigning rooms to sessions.) The mixed seating arrangements seemed pleasing to attendees, happy to occasionally have tables at which to sit, and smaller programs were not stuck in rooms with vast rows of empty seats.

Because of the addition of subject tags, the Technology track was eliminated this year, due to its prevalence as a factor in so many other areas. Attendees were able to search for “Technology” and find many more sessions than the eight in a typical track. Other tracks were Administration/Management, Collections/Tech Services, Leadership, Marketing/Advocacy, Serving Adults, Serving Youth, Spaces and Places, and Staffing.

Over 1400 attendees completed the post-conference evaluation. Nearly 87% selected the educational programs as their primary reason for attending the conference. The exhibits were the #2 reason, with almost 41%. 97.6% learned something they felt they would be able to apply immediately in their jobs. Almost 99% of respondents would recommend attending a future PLA Conference to their colleagues. 99.9% of respondents attended program sessions and of those, 96% thought programs were excellent or good. Just over 50% of respondents attended a ConverStation session and of those, nearly 85% rated them as excellent or good. Just over 72% attended Big Ideas sessions and of those, 95.5% rated them as excellent or good.

For the first time, PLA hosted Sparks Talks. Scheduled during the last two program timeslots on Thursday and Friday, these sessions featured brief (5 minutes maximum) presentations on hot topics, which were submitted shortly before the conference. Both sessions were full to overflowing.

#### *SPECIAL EVENTS*

Ann Patchett took the role of readers' advisor and shared some of her favorite books with an enthusiastic audience during the "Ann Patchett Book Hour" on Wednesday morning.

#### *GENERAL SESSIONS & BIG IDEAS SERIES*

The Opening General Session speaker Bryan Stevenson, Founder and Director of the Equal Justice Initiative, delivered a compelling speech that challenged the packed house to work as agents of social change.

The BIG IDEAS Series kicked off with Simon Sinek bright and early on Thursday morning, speaking to a packed house of almost 4,000 people. The second installment of the BIG IDEAS series proved to be just as popular as almost 4,000 assembled to hear Megan McArdle, David McRaney & Clive Thompson Friday morning. Amy Cuddy closed the very successful series on Saturday morning with another well-attended session.

The conference was brought to a close with humorist and best-selling author David Sedaris.

#### *MEAL EVENTS*

More than 2,800 tickets were sold for six meal events, five author luncheons and the Audio Publishers Dinner. This compares with more than 1,900 sold for six events in Philadelphia, and nearly 2,300 which were sold in Portland.

#### **Attendee Evaluation Results**

An online evaluation was sent to all full conference attendees on March 20. Attendees were sent individualized links in order to avoid duplicate responses. Four \$100 Amex gift cards were used as an incentive for completing the survey. The evaluation was open for four weeks and ended on April 18. Final results of the online evaluation survey will be available at Annual Conference. A total of 1430 attendees completed the conference evaluation and among the results:

- 98.7% of the respondents would recommend the PLA conference to a colleague.
- 93.2% of the respondents felt that there were sufficient opportunities to network/meet new colleagues at this conference.
- 99% of the respondents visited the exhibits at least once.

Comments from respondents include:

- "It was an incredible, insightful and altogether useful conference. Thank you not only for providing pertinent information, but for making EVERYTHING so easy--from signage, to finding rooms, to getting session information....my only

complaint is that there wasn't enough time in the week! This conference left me wanting MORE, MORE, MORE! Thank you for your hard work. The off-the-cuff-pre-Ann-Patchett-trivia contest was also pretty great! BRAVO!"

- "This was my first PLA conference, and I hope that there will be more. It was probably the best conference I have attended in more than 30 years. I learned a lot, and came home with some very practical ideas."
- "Thank you for a great conference! Bryan Stevenson's presentation and The Big Ideas sessions were inspiring. The workshops I attended gave me ideas and tools to improve service and I enjoyed meeting lots of colleagues from all over the US and beyond."

### **Virtual Conference**

PLA's Virtual Conference, held in conjunction with the PLA 2014, was a financial and critical success this year. We received a total of 141 registrations, 62 of those were group registrations. This compares to 136 total registrations for the 2012 Virtual Conference (49 groups).

This year's virtual conference registration revenue is \$58,980.00 with expenses of \$29,970.00. In 2012 virtual conference registration revenue was at \$46,694.00; with expenses of \$28,117.50.

The Virtual Conference featured five live programs per day on Thursday and Friday of conference. Virtual conference registrants also got a taste of the BIG IDEAS sessions, with Megan McArdle joining them for an interview over the break on Friday afternoon. Thursday afternoon's author interview featured Erika Johansen, the debut author of *The Queen of the Tearling*.

The 2014 Virtual Conference also featured Virtual Poster Sessions on Facilitating a Community Novel Project, Christian Fiction at the Library, Public Libraries Serving Homeless LGBTQ Youth, and Unexpected Collections in Your Library. Registrants were happy with their Virtual Conference experience, with nearly all session receiving high mark. Selected comments from the survey:

- "Thank you for offering the virtual conference. I am usually unable to attend the actual conference, so this is the next best thing! I have enjoyed the programs that I have been able to listen to and have learned a lot."
- "The virtual opportunity made it possible for more of my staff to attend sessions at a price that our budget could afford. I plan to use at least Black Belt Librarian session at our all-staff workshop day March 31 and others throughout the year. Many thanks!"
- "It was so nice not to have to travel.... I checked in with staff after each section... they were all excited about this type of opportunity."
- "I love the PLA Virtual Conference, but would like it if it were broken into two choices: Large city/county libraries or small/rural libraries. I would like to hear more "how I did it stories" from libraries I can relate to. We have a FTE of 7. I think a lot of libraries are in our boat."

## **Exhibits**

Exhibit sales were strong – 338 companies exhibited from 675 booths and 10 table tops. This compares to 352 exhibiting companies from 727 booths and 20 table tops in 2012.

Exhibitors were very pleased with traffic in the hall. Their satisfaction in the PLA Indianapolis conference is reflected in booth sales for the next PLA conference in Denver in 2016. Our exhibit management company confirmed 179 companies in 496 booths for 2016 – about 74% of our 2014 total sq ft (675 booths).

An email with a link to an online questionnaire, developed by Corcoran Expositions, Inc., was sent to the exhibitors of PLA 2014. Results included:

- 64% reported the overall conference as “Excellent” or “Good” compared to past PLA conferences.
- 71% of respondents reported that the overall traffic in the exhibit hall met their expectations.
- 59% of the respondents reported that they would definitely recommend exhibiting at PLA 2016.

Positive comments included:

- “PLA in Indianapolis this year was the best show we have exhibited in the last three years. Great traffic and leads. We have signed up for PLA 2016.”
- “If you are in the public library market in any way shape or form, PLA should be a must attend show for your company.”
- “If public libraries are your customers, PLA is the place to meet them.”
- “I would highly recommend PLA conference to both participants and vendors. The conference sessions are extremely informative and up-to-date with key library issues. For exhibitors, there’s good traffic with key decision makers.”

Areas for improvement:

- Better promotion of events in the exhibit hall to boost traffic.
- Passport to prize promotion to promote traffic in the hall and retain traffic until show close.

## **Conclusion**

PLA 2014 was a great success. Excellent programming and well-attended exhibits again prevailed at PLA, making for a very successful conference. All parties involved should be very proud of their accomplishments!



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**TO:** PLA Board of Directors

**FROM:** Barbara Macikas, Executive Director

**RE:** Election Results 2014

**DATE:** June 9, 2014

**PLA President, 2015–2016**

[Vailey Oehlke](#), Director of Libraries, Multnomah County (Ore.) Library

**ALA Division Councilor**

[Rivkah Sass](#), Director, Sacramento (Calif.) Public Library

**Directors-At-Large**

[Melanie Huggins](#), Executive Director, Richland Library, Columbia, S.C.

[Manya Shorr](#), Assistant Director, Community Programs and Services, Omaha (Neb.) Public Library

Congratulations to all the 2014 PLA election winners. Terms begin immediately following the [2014 ALA Annual Conference](#) in Las Vegas and end at Annual Conference 2017.

**Nominating Committee:**

Marcia A. Warner (chair), Brenda J. Brown, Erin Gray, Lindsey A. Levinsohn, Rivkah K. Sass and Felton Thomas, Jr.



Date: 6/9/2014

To: PLA Board of Directors  
From: Kathleen Hughes, Editor and Manager, Publications  
Re: *Public Libraries*

According to the April report, ad sales in fiscal year 2014 are behind budget. The report shows that gross advertising revenue is at \$29,083; the budgeted figure is at \$36,492. For comparison purposes, at this time last year, advertising sales were at \$33,642. This ad revenue difference is mostly a timing issue – all advertising revenues have not yet been collected. As this was a conference year, we did see a small boost in advertising over the past few issues and so will likely meet or exceed our advertising target.

Our subscription base has shrunk a bit; we currently have 528 subscriptions. At this time last year we had 580 subscriptions. Subscription revenues also are slightly behind; budgeted to be \$27,832; the actual figure is \$26,528. A subscription drive was implemented in early June, which should increase subscriptions and bring revenue to the targeted figure by the end of the fiscal year.

In terms of expenses, we are budgeted to be at \$90,466; at this point expenses are at \$55,589. Expenses will catch up to the budgeted figure, as production bills are processed and paid. We are planning to hold the line on expenses, to remain in line with the budgeted expense figure through the end of the fiscal year.

### **Publiclibrariesonline.org**

The online companion site to “Public Libraries” continues to thrive. Like the print iteration, PLOnline ([www.publiclibrariesonline.org](http://www.publiclibrariesonline.org)) focuses on issues and topics that matter to public libraries and public librarianship. Updated daily, the site features selections from the print magazine as well as unique content. With well over thirty energetic volunteer bloggers, the site covers a very wide range of topics. PL Online offers hundreds of articles on library-related topics in addition to author interviews and coming soon, indy e-book reviews. Posts are comment-enabled so readers can share ideas on the often thought-provoking topics, as well as share their own stories or experiences. A variety of social networking options accompany the site, these include Facebook ([www.facebook.com/publiclibrariesonline](http://www.facebook.com/publiclibrariesonline)), Twitter (@publibonline), and Pinterest (<http://pinterest.com/publibonline>).

We are happy to report that the site is very busy – here is a look at recent statistics:

- From January 1, 2014 – May 31, 2014 - 64,333 users (formerly unique visitors).
- 82,786 sessions (formerly visits), with 81.9% by new visitors and 18.1% by returning visitors and an average session duration of 1 minute, 3 seconds.
- 121,898 pageviews, for an average of 1.47 pages per session.

We have also begun to accept advertising on the site and have run several ads since January 1, 2013.



Date: 6/9/2014

To: PLA Board of Directors

From: Kathleen Hughes, Manager, Publications

Re: PLA Publications

### Sales

As of the April report, PLA Publications revenues are behind budget. Currently at \$8,921, the sales figure was budgeted to be \$25,264. At this time last year, sales were at \$16,522. This lag in sales can be attributed to a lack of new publications and our backlist growing older, and attracting less interest.

Overall, association publishing has become less financially viable in light of open access and widely available interactive learning tools available to members, and PLA has not been unaffected by this trend. While we are committed to disseminating and advancing knowledge via publishing; we will need to engineer a transition to a new model of publishing and determine how to navigate the transition, in light of our current need to maintain a revenue stream from publishing efforts.

For this year, we are exploring way to maximize revenue (sales, etc.) and meet budget by the end of the fiscal year. These sales figures are for PLA publications only and do not include ECRR figures, or the PLAmetrics (PLDS subscription database) which are listed separately, below.

### Expenses

We are well below budget on expenses. The budgeted figure is \$25,198; we are actually at \$7,071. We plan to hold the line on expenses throughout the remainder of the fiscal year.

### Other PLA Publishing Activities

#### Public Library Data Service Statistical Report (PLAmetrics)

As of the 2011 report, PLA ceased printing a paper PLDS report. For the past few years, PLA has offered access to the PLDS data, initially via the University of Illinois and for the past two year via Counting Opinions. The database, now known as PLAmetrics ([www.plametrics.org](http://www.plametrics.org)) is available via subscription. A subscription (\$250) provides unlimited web access to data and reports from the Public Library Data Service Survey for one year (12 months). At this point, we have **171 active subscriptions**. For comparison purposes here are the subscription numbers from previous years:

2013 (June) – 167 subscriptions (PLAmetrics via Counting Opinions)

2013 (March) – 169 subscriptions (PLAmetrics via Counting Opinions)

2012 (December) – 173 subscriptions (PLAmetrics via Counting Opinions)

2011-138 subscriptions (PLAmetrics via Counting Opinions)

2010 – 69 subscriptions (PLAmetrics via Counting Opinions)

2009 – 78 subscriptions (PLDS subscription database via the University of Illinois)

2008 – 83 subscriptions (PLDS subscription database via the University of Illinois)

2007 – 70 subscriptions (PLDS subscription database via the University of Illinois)

At the 2013 Annual Conference, the PLDS committee recommended, to the PLA Board of Directors, that PLA discontinue the PLDS survey and PLAmetrics. Their exact recommendation was accepted by the board, this is it:

*As the PLDS committee cannot foresee a reduction or elimination of public library data collection by IMLS, we recommend to the PLA Board the discontinuation of the majority of the PLDS annual survey. The survey questions that duplicate those asked in the IMLS survey do not need to continue. However, the PLDS survey could transform into a small set of more-frequently issued, thematic questions that PLA could distribute. We could investigate utilizing the ALA Office for Research & Statistics (ORS) to conduct these trends surveys. It is anticipated that, based or similar work done by ORS for ACRL, the trends surveys could be conducted at greatly reduced costs compared to outsourcing to Counting Opinions. If supported by ALA-ORS, the first trend survey (on Outcomes) could be issued this fall; this specialty trend survey would complement PLA President Carolyn Anthony's creation of the Performance Measurement Task Force.*

Upon notification that that PLA would cease production of PLDS/PLAmetrics, Counting Opinions offered PLA a licensing agreement, wherein they would continue to manage the survey, taking over all aspects of the project, and would pay PLA royalties based on sales. PLA accepted and entered into this agreement in January, 2014. We are currently settling the finances related to the previous agreement and look forward to receiving royalties from Counting Opinions starting July, 2014.

### **Every Child Ready to Read (ECRR) 2<sup>nd</sup> Edition (2011-001)**

Sales of the ECRR kit and auxiliary products have been very strong. Since its release in June, 2011, we have sold 3,385 kits. At this point last year we had sold 2,870 kits.

Outside of the kits we have sold additional products:

English Brochures - Packets of 100 -- 2,504; last year at this time 1,795 packets

English Bookmarks – Packets of 100 -- 1,175; last year at this time 898 packets

English Posters -- 2,055; last year at this time 1,672

Spanish Brochures: -- 253; last year at this time 104 packets

Spanish Bookmarks – 137; last year at this time 40 packets

Spanish Posters – 252; last year at this time 122

\*New!! ECRR Toolkit for Spanish-Speaking– 38

\*The ECRR Toolkit for Spanish-Speaking Patrons was released this past March during PLA 2014.

### **Other**

PLA is working on a publication, ‘The PLA Guide to Film Programming for Public Librarians,’ with librarian Kati Irons. The book is slated to be released by ALA editions this summer.

Date: June 9, 2014  
 To: PLA Board of Directors  
 From: Steven Hofmann, Manager, Web Communications  
 Re: Technology Report

## PLA On-Demand Webinars

The archived recordings of PLA's webinars went on sale as on-demand webinars (<http://www.ala.org/pla/onlinelearning/webinars/ondemand>) via the ALA Store on February 13, 2012.

FY14 gross sales through May 31, 2014 were \$6,835; an increase of \$1,522 since March 31, 2014, the date through which sales were last reported. Titles with sales since March 31, 2014, are highlighted in yellow. Life-to-date gross sales of these products through May 31, 2014, were \$15,513.

On-Demand Webinar Title	FY2014		Life-to-Date	
	Amt	Qty	Amt	Qty
Right on the Money: Financial Literacy @ your library			\$28	1
Right on the Money: Financial Literacy @ your library (group)				
Creating a User-Centered Website for Your Library			\$168	6
Creating a User-Centered Website for Your Library (group)			\$119	1
Cracking QR Codes			\$112	4
Cracking QR Codes (group)				
Transforming Our Image Parts I & II	\$140	5	\$364	13
Transforming Our Image Parts I & II (group)	\$119	1	\$476	4
Dive into a Good Book			\$84	3
Dive into a Good Book (group)				
Check Out E-Readers!			\$84	3
Check Out E-Readers! (group)			\$119	1
Intro to E-Books			\$140	5
Intro to E-Books (group)			\$119	1
Building Community: Online Tools for Spanish Speakers			\$84	3
Building Community: Online Tools for Spanish Speakers (group)				
Laying the Groundwork for a Successful E-Book Collection			\$84	3
Laying the Groundwork for a Successful E-Book Collection (group)			\$119	1
Powering Up Your E-Book Program			\$56	2
Powering Up Your E-Book Program (group)				
Strategies for Sustaining Your Library's E-Book Program			\$28	1
Strategies for Sustaining Your Library's E-Book Program (group)				
Fully Engaged Customer Service at Your Library	\$392	14	\$1,148	41
Fully Engaged Customer Service at Your Library (group)	\$952	8	\$2,023	17
Creating a Digital Media Lab at Your Library	\$140	5	\$504	18
Creating a Digital Media Lab at Your Library (group)			\$238	2
Quick Fixes for Library Displays			\$112	4

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Quick Fixes for Library Displays (group)					
Implementing "Choose Civility," a Community-wide Campaign	\$28	1	\$140	5	
Implementing "Choose Civility," a Community-wide Campaign (group)					
E-Books 101 – A Look at Devices, Platforms, and Training Ideas	\$28	1	\$308	11	
E-Books 101 – A Look at Devices, Platforms, and Training Ideas (group)	\$238	2	\$238	2	
Stretching Your Library's E-Books Budget			\$28	1	
Stretching Your Library's E-Books Budget (group)					
E-Books and Customer Service at Your Library	\$56	2	\$112	4	
E-Books and Customer Service at Your Library (group)			\$119	1	
E-Books and Libraries: What's Next?	\$56	2	\$364	13	
E-Books and Libraries: What's Next? (group)			\$119	1	
<b>Copyright: What You REALLY Need to Know</b>	\$112	4	\$168	6	
Copyright: What You REALLY Need to Know (group)	\$119	1	\$357	3	
<b>Screentastic! Using Screencasting</b>	\$76	2	\$228	6	
Screentastic! Using Screencasting (group)			\$119	1	
Are Your Mental Models of a Library Holding You Back?	\$28	1	\$112	4	
Are Your Mental Models of a Library Holding You Back? (group)	\$357	3	\$833	7	
Alternative Reads			\$28	1	
Alternative Reads (group)					
<b>Make Way for Makerspaces in the Library</b>	\$168	6	\$252	9	
Make Way for Makerspaces in the Library (group)	\$119	1	\$476	4	
The State of E-books in Public Libraries and Publishing			\$56	2	
The State of E-books in Public Libraries and Publishing (group)			\$238	2	
<b>The Elusive Library Non-User</b>	\$168	6	\$308	11	
<b>The Elusive Library Non-User (group)</b>	\$476	4	\$476	4	
On Life Support, But Not Dead Yet! Revitalizing Reference	\$140	5	\$476	17	
On Life Support, But Not Dead Yet! Revitalizing Reference (group)	\$119	1	\$238	2	
The Thinking Person's Guide to Stress Management	\$84	3	\$140	5	
The Thinking Person's Guide to Stress Management (group)	\$238	2	\$595	5	
How to Be a Webinar Superstar	\$84	3	\$140	5	
How to Be a Webinar Superstar (group)					
<b>Early Literacy Programming in the Digital Age</b>	\$280	10	\$280	10	
Early Literacy Programming in the Digital Age (group)			\$119	1	
Street Smart: Urban Fiction in Public Libraries	\$28	1	\$28	1	
Street Smart: Urban Fiction in Public Libraries (group)			\$119	1	
Is Community Assessment a High Hurdle?	\$137	5	\$137	5	
Is Community Assessment a High Hurdle? (group)	\$238	2	\$238	2	
Face-to-Face Presentation Skills	\$196	7	\$196	7	
Face-to-Face Presentation Skills (group)	\$238	2	\$238	2	
Partners in Literacy	\$84	3	\$84	3	
<b>Creating Engaged &amp; Motivated Staff</b>	\$168	6	\$168	6	
Creating Engaged & Motivated Staff (group)	\$119	1	\$119	1	

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Fundraising 101	\$28	1	\$28	1
Friends & Foundations	\$28	1	\$28	1
Friends & Foundations (group)	\$119	1	\$119	1
It's All in the Planning (group)	\$476	4	\$476	4
Supervise with Success	\$90	2	\$90	2
Supervise with Success (group)	\$169	1	\$169	1
Totals	\$6,835	130	\$15,513	315

## PLA Web Analytics

In response to Christine Hage's question at the Spring Board meeting about context for website analytics, this report also includes a comparison of PLA's primary analytics with those of the other ALA divisions (see attached PDF). Although comparisons with other divisions do not necessarily have an "apples to apples" correlation, they may still offer some internal context. The attached PDF also includes a comparison of year-to-date analytics with the same period in previous years for the PLA site, the PLA Conference sites (2014 and 2012), and Public Libraries Online.

Comparisons with the website analytics of external organizations are more difficult, in that such data are not often made publicly available. A member of ALA's ITTS staff made efforts to reach out to other membership associations about the possibility of comparing website analytics, but received no responses. And for-profit businesses are likely to measure their site usage with different metrics—for example, conversions of visitors to customers via online sales—which don't necessarily offer us a valid comparison.

Perhaps comparisons with other organizations, be they internal or external, nonprofit or for-profit, don't tell us much about our own website. Instead, maybe we should look at the PLA website analytics as indicators of what types of content visitors to our site are seeking or find most useful. We could then target resources to increase those types of content and/or consider ways of either improving or pruning areas of the site not frequently visited. Maybe we could set goals for the PLA website—decide what we want to accomplish via the site—and then determine what metrics would allow us to measure our success or failure in attaining those goals.

## PLA Website

Year-to-date (January 1–May 31, 2014) statistics reported by Google Analytics for the PLA website:

- 34,217 users (formerly unique visitors)
- 64,846 sessions (formerly visits), with 46.1% by new visitors and 53.9% by returning visitors and an average session duration of 2 minutes, 25 seconds
- 135,735 pageviews, for an average of 2.09 pages per session
- 88.01% of sessions were from the U.S., 2.99% from Canada, and the remaining from countries including India, the U.K., Australia, China, Philippines, Indonesia, Spain, and Germany

- Top 10 pages by pageviews were:
  - Homepage – 37,760 pageviews
  - Conferences & Continuing Education – 16,635 pageviews
  - Membership – 3,127 pageviews
  - On-Demand Webinars – 3,293 pageviews
  - Public Libraries Magazine (*not* Public Libraries Online) – 2,960 pageviews
  - Careers in Public Librarianship (Professional Tools) – 2,630 pageviews
  - About PLA – 2,469 pageviews
  - Online Learning – 2,278 pageviews
  - Professional Tools – 2,128 pageviews
  - Results Boot Camp – 1,944 pageviews
- Primary source of traffic on the site was search engine results (65.11% of sessions), followed by users entering URLs directly in their browsers or using bookmarks (19.89%), then links from other sites or e-mail communications (13.37%), links from social media (1.63%), and other (.01%)
- Top 10 sources of traffic by sessions were:
  - Google – 38,518 sessions
  - entering URLs or bookmarks – 12,898 sessions
  - Bing – 2,441 sessions
  - placonference.org – 1,584 sessions
  - Yahoo – 800 sessions
  - Lj.libraryjournal.com – 765 sessions
  - Facebook – 335 sessions
  - Twitter – 221 sessions
  - PLA/ALA e-mail newsletters and e-blasts – 202 sessions
  - Yahoo Secure Search – 200 sessions

## PLA 2014 Conference Website

Year-to-date (January 1–May 31, 2014) statistics reported by Google Analytics for the PLA 2014 website:

- 64,394 users (formerly unique visitors)
- 119,373 sessions (formerly visits), with 50.7% by new visitors and 49.3% by returning visitors and an average session duration of 3 minutes, 14 seconds
- 294,695 pageviews, for an average of 2.47 pages per session
- 94.28% of sessions were from the U.S., 2.69% from Canada, and the remaining from countries including the India, U.K., Germany, Australia, Singapore, China, Brazil, and Pakistan
- Top 10 pages by pageviews were:
  - Homepage – 113,418 pageviews
  - Programs – 35,871 pageviews
  - Register – 23,821 pageviews
  - Virtual Conference – 14,528 pageviews
  - Housing – 12,970 pageviews

- Preconferences – 7,447 pageviews
- Preliminary Program (landing page, not actual program) – 6,104 pageviews
- Mobile App (landing page, not actual app) – 4,411 pageviews
- Restaurants in Indianapolis – 4,395 pageviews
- Shuttle Schedule – 4,159 pageviews
- Primary source of visits to the site was search engine results (45.61%), followed by links from other sites or e-mail communications (31.45%), then users entering URLs directly in their browsers or using bookmarks (21.12%), links from social media (1.78%), and other (.04%)
- Top 10 sources of traffic by sessions were:
  - Google – 50,098 sessions
  - entering URLs or bookmarks – 25,211 sessions
  - ala.org (this would include the PLA site) – 21,450 sessions
  - SmartCity (on-site wifi hotspots) – 7,466 sessions
  - Bing – 3,269 sessions
  - fountas-and-pinnell.wikispaces.com – 1,076 sessions
  - a2zinc.net (exhibits management site) – 817 sessions
  - Twitter – 810 sessions
  - Yahoo – 776 sessions
  - Facebook – 690 sessions

## Public Libraries Online Website

Year-to-date (January 1–May 31, 2014) statistics reported by Google Analytics for the Public Libraries Online website:

- 64,333 users (formerly unique visitors)
- 82,786 sessions (formerly visits), with 81.9% by new visitors and 18.1% by returning visitors and an average session duration of 1 minute, 3 seconds
- 121,898 pageviews, for an average of 1.47 pages per session
- 63.94% of sessions were from the U.S., 5.79% from Canada, and the remaining from countries including the U.K., India, Australia, the Philippines, the Netherlands, South Africa, Indonesia, and Pakistan
- Top 10 pages by pageviews were:
  - Community Centered: 23 Reasons Why Your Library Is the Most Important Place in Town (Sep/Oct 2011; posted Apr 2013) – 17,012 pageviews
  - Homepage – 13,657 pageviews
  - The Public Library Data Service 2012 Statistical Report: Characteristics and Trends (Nov/Dec 2012; posted Dec 2012) – 2,981 pageviews
  - Personal Digital Archiving: Saving Cell Phone Texts (posted Jul 2013) – 2,538 pageviews
  - Simple Crafts for Teens (posted May 2013) – 2,496 pageviews
  - Ten Essential Qualities for Success: A New Cataloging Librarian's Guide from a Supervisor's Perspective (May/Jun 2013; posted Jun 2013) – 2,377 pageviews
  - Digital Magazines @ Your Library (posted Mar 2013) – 2,089 pageviews

- The Physical Effects of E-Reading (posted Feb 2014) – 1,744 pageviews
- Evaluating Summer Reading Programs: Suggested Improvements (Jul/Aug 2010; posted May 2013) – 1,694 pageviews
- Big Impact Personal Library Service (posted Feb 2014) – 1,640 pageviews
- Primary source of visits to the site was search engine results (64.48%), followed by users entering URLs directly in their browsers or using bookmarks (19.11%), then links from other sites or e-mail communications (8.69%), links from social media (7.71%), and other (.01%)
- Top 10 sources of traffic by sessions were:
  - Google – 51,131 sessions
  - entering URLs or bookmarks – 15,818 sessions
  - ala.org (this would include the PLA site) – 2,400 sessions
  - Facebook – 1,934 sessions
  - Facebook Mobile – 1,683 sessions
  - Pinterest – 1,180 sessions
  - Bing – 1,069 sessions
  - Twitter – 730 sessions
  - Yahoo – 528 sessions
  - Ask – 401 sessions

## PLA 2014 Conference Mobile App

As of the writing of this report, Boopsie had still not yet provided a mobile app usage report. Earlier this year ALA became aware of Boopsie infringing on its trademark by creating a conference app using ALA website data and logo without ALA's permission. ALA sent a cease-and-desist letter, which Boopsie said it would comply with. Although Paul Graller of ALA Conference Services says this situation should not have had any impact on PLA's relationship with Boopsie, I've received no replies from our Boopsie contact to any of my e-mail or phone requests for a usage report since April 18, 2014.

#### **Year-to-Date (January 1–May 31, 2014) Comparison with Other Divisions**

	PLA	AASL	ACRL	ALCTS	ALSC	ASCLA	LITA	LLAMA	RUSA	UNITED	YALSA
Users	34,217	226,007	167,439	47,966	505,986	21,177	20,572	7,059	80,649	15,264	289,749
Sessions	64,846	350,372	283,967	88,306	778,583	29,002	36,672	15,422	122,872	26,404	428,732
Average Session Duration	0:02:25	0:03:03	0:02:20	0:02:48	0:02:38	0:01:23	0:02:12	0:03:24	0:02:22	0:03:22	0:02:36
Pageviews	135,735	719,782	574,691	199,302	1,853,651	44,369	90,968	39,129	239,809	64,655	1,206,696
Average Pages per Session	2.09	2.05	2.02	2.26	2.44	1.53	2.48	2.54	1.95	2.45	2.81
Primary source: Search engine results	65.11%	68.93%	65.62%	62.95%	73.85%	75.69%	57.37%	67.22%	64.85%	56.56%	64.84%
Primary source: URLs and bookmarks	19.89%	15.99%	18.18%	22.12%	12.05%	14.30%	22.17%	16.42%	19.38%	18.99%	13.77%
Primary source: Links and emails	13.37%	12.93%	14.24%	11.40%	12.23%	8.94%	18.36%	13.54%	14.17%	21.45%	16.08%
Primary source: Social media	1.63%	2.13%	1.90%	3.43%	1.86%	1.05%	20.60%	2.79%	1.56%	2.97%	5.29%
Primary source: Other	0.01%	0.01%	0.06%	0.09%	0.00%	0.01%	0.03%	0.02%	0.03%	0.02%	0.01%

	PLA + PLA 2014	AASL	ACRL	ALCTS	ALSC	ASCLA	LITA	LLAMA	RUSA	UNITED	YALSA
Users	98,611	226,007	167,439	47,966	505,986	21,177	20,572	7,059	80,649	15,264	289,749
Sessions	184,219	350,372	283,967	88,306	778,583	29,002	36,672	15,422	122,872	26,404	428,732
Average Session Duration	0:02:50	0:03:03	0:02:20	0:02:48	0:02:38	0:01:23	0:02:12	0:03:24	0:02:22	0:03:22	0:02:36
Pageviews	430,430	719,782	574,691	199,302	1,853,651	44,369	90,968	39,129	239,809	64,655	1,206,696
Average Pages per Session	2.34	2.05	2.02	2.26	2.44	1.53	2.48	2.54	1.95	2.45	2.81

	<b>PLA + PLA 2014 + PL Online</b>	<b>AASL</b>	<b>ACRL</b>	<b>ALCTS</b>	<b>ALSC</b>	<b>ASCLA</b>	<b>LITA</b>	<b>LLAMA</b>	<b>RUSA</b>	<b>UNITED</b>	<b>YALSA</b>
<b>Users</b>	167,944	226,007	167,439	47,966	505,986	21,177	20,572	7,059	80,649	15,264	289,749
<b>Sessions</b>	267,005	350,372	283,967	88,306	778,583	29,002	36,672	15,422	122,872	26,404	428,732
<b>Average Session Duration</b>	0:02:14	0:03:03	0:02:20	0:02:48	0:02:38	0:01:23	0:02:12	0:03:24	0:02:22	0:03:22	0:02:36
<b>Pageviews</b>	552,328	719,782	574,691	199,302	1,853,651	44,369	90,968	39,129	239,809	64,655	1,206,696
<b>Average Pages per Session</b>	2.07	2.05	2.02	2.26	2.44	1.53	2.48	2.54	1.95	2.45	2.81

**Year-to-Date (January 1–May 31, 2014) Comparison with Same Period in Previous Years**

**PLA Website**

	<b>Jan-May 2014</b>	<b>Jan-May 2013</b>	<b>% Change</b>
<b>Users</b>	34,217	36,212	-5.51%
<b>Sessions</b>	64,846	70,380	-7.86%
<b>Average Session Duration</b>	0:02:25	0:02:23	1.40%
<b>Pageviews</b>	135,735	150,660	-9.91%
<b>Average Pages per Session</b>	2.09	2.14	-2.34%

**PLA Conference Websites**

	<b>PLA 2014 Jan-May 2014</b>	<b>PLA 2012 Jan-May 2012</b>	<b>% Change</b>
<b>Users</b>	64,394	55,147	16.77%
<b>Sessions</b>	119,373	100,147	19.20%
<b>Average Session Duration</b>	0:03:14	0:04:26	-27.07%
<b>Pageviews</b>	294,695	330,426	-10.81%
<b>Average Pages per Session</b>	2.47	3.30	-25.15%

**Public Libraries Online Website**

	<b>Jan-May 2014</b>	<b>Jan-May 2013</b>	<b>% Change</b>
<b>Users</b>	69,333	32,228	115.13%
<b>Sessions</b>	82,786	41,640	98.81%
<b>Average Session Duration</b>	0:01:03	0:01:25	-25.88%
<b>Pageviews</b>	121,898	75,186	62.13%
<b>Average Pages per Session</b>	1.47	1.81	-18.78%

## **REPORT TO PLA BOARD**

**FROM:** EMILY SHEKETOFF  
**DATE:** JUNE 9, 2014  
**SUBJECT:** WASHINGTON OFFICE REPORT

### **Policy Discussions Continue at ALA Midwinter Meeting**

Large numbers of attendees participated in policy sessions hosted by the ALA Washington Office at the 2014 ALA Midwinter Meeting, including conference sessions that explored E-rate funding, copyright lawsuits, ebook access, federal depository libraries and internet filtering. More than one hundred attendees gathered to hear insider information on last June's National Security Agency leak from *Guardian* Editor Spencer Ackerman.

During other ALA Washington Office sessions, publishing and library experts discussed the best ways libraries can bring together authors and readers in the digital age. In one copyright session, Google Legal Counsel Fred von Lohmann discussed the Google Book Search lawsuit court ruling. Finally, library and policy leaders at the conference detailed ALA's vision for an E-rate 2.0 that better serves America's libraries and communities.

On a related note, OITP and Google, Inc. jointly sponsored a Google Glass demonstration booth at the 2014 ALA Midwinter Meeting. For two days, crowds of meeting attendees lined up to try Google Glass, the new display device from Google that's worn like a pair of glasses and rests just above your eyes. Wilson L. White, public policy manager of Glass at Google, and technical members of the Google Glass Team were on hand to talk about the wearable computers.

### **ALA Washington Office Launches Video Advocacy Campaign**

In January, the ALA Washington Office launched "Libraries Matter," a series of four videos that highlight the ways that funds from the Library Services Technology Act are used by libraries to help patrons. LSTA funds are used to support digital literacy, high-speed internet access, small business assistance, job assistance, ebooks and New Americans assistance. The visual videos can be used by library advocates to educate local and state policymakers and Capitol Hill staff about library issues and show legislators the ways that libraries impact their communities. Access the videos: <https://www.youtube.com/playlist?list=PL5E1ShbPqE4CQ1v86FXWJfZLSjSaXngIM>.

### **ALA Prepares to Help Protect the Open Internet via Net Neutrality**

On January 14, 2014, the U.S. Court of Appeals ruled to strike down most of the Open Internet Order, giving commercial companies the astounding legal authority to block Internet traffic, offer preferential treatment to certain Internet services or applications, and steer users to certain web sites based on their own commercial interests. In response, Barbara Stripling published an op-ed, titled "[Why Net Neutrality's Demise Hurts the Poor Most](#)," in *Wired* magazine, which received a tremendous amount of technology policy and library media coverage.

Later, ALA with ARL and EDUCAUSE sent a letter to FCC Chairman Tom Wheeler, offering to work with the FCC in developing new policies that preserve network neutrality and incorporate the essential roles libraries play in this area.

In May, the Federal Communications Commission (FCC) voted to open a new Notice of Proposed Rulemaking on ensuring the Open Internet. The American Library Association will actively engage—with ALA members, with library allies, with the FCC and with Congress, if needed—in this vital proceeding. ALA was one of the first to file when the FCC opened the docket in February.

ALA, the Association of Research Libraries and EDUCAUSE followed up with key FCC staff and shared the perspective of education, research and learning organizations and examples of what's at stake for our community and our users. Beyond the most basic challenges to equitable access to information and intellectual freedom, higher education and libraries are generators and subscribers of critical educational and cultural content that could suffer under a two-tier or “fast-lane” approach to network neutrality. In May, Office of Government Relations Director Lynne Bradley was interviewed by *The Washington Post* for the feature article “Why the death of net neutrality would be a disaster for libraries”:

<http://www.washingtonpost.com/blogs/the-switch/wp/2014/05/16/why-the-death-of-net-neutrality-would-be-a-disaster-for-libraries/>.

The ALA Washington Office asks that libraries email the ALA Washington Office ([lclark@alawash.org](mailto:lclark@alawash.org)) with examples of Internet Service Provider (ISP) slowdowns, lost quality of service relative to subscribed ISP speeds, and any other harm related to serving community needs.

### **Washington Office Hosts Press Briefing at National Press Club**

On May 6, 2014, the American Library Association hosted “Responding to the Second Digital Divide,” a National Press Club briefing that explored the ways that governments, schools and communities can better support libraries in bridging the growing skills-based digital divide. Panel leaders detailed effective tactics to sustain and improve Internet accessibility in libraries and discuss future directions for public access to information. The event coincided with the release of data showing that the digital divide is expanding, affecting far more than the disconnected—according to the report, one-fifth of people with advanced online access have insufficient levels of digital skills. Panelists included Clarence Anthony, executive director, of National League of Cities; John B. Horrigan, communications and technology policy consultant; Richard Reyes-Gavilan, executive director, District of Columbia Public Library; and Barbara Stripling, president, American Library Association.

### **The Washington Office Welcomes Adam Eisgrau**

In April, former ALA Washington Office colleague Adam Eisgrau returned to the American Library Association. He is a veteran intellectual property and privacy policy lobbyist and joined the ALA’s copyright and privacy advocacy efforts to increase visibility for library issues on a national level. As Congress takes renewed interest in copyright law, privacy measures and surveillance reform, Eisgrau will use his extensive background on these issues to increase the association’s presence in Washington and educate lawmakers on the issues libraries face in championing the information rights and needs of the public.

## **OFFICE FOR INFORMATION TECHNOLOGY POLICY (OITP)**

### **New *American Libraries* Supplement Examines Major Trends in Digital Content**

In May, *American Libraries* magazine released “Digital Discoveries,” a new digital supplement where leading library visionaries and experts discuss trends in digital content technology and the current state of library ebook lending. Developed by ALA’s Digital Content Working Group (DCWG), the digital supplement examines the ways that public and school libraries are defining their roles in the evolving digital publishing environment in a variety of new and interactive ways. The digital supplement also details ALA’s progress in advocating for equitable access to ebooks produced by the world’s largest book publishers. The supplement features ALA member-leaders, such as Past President Molly Raphael, and national experts, such as Lee Rainie of the Pew Internet Project. Read the full report: <http://viewer.zmags.com/publication/28a54223>.

### **E-rate Engagement Continues**

In April, the American Library Association called on the FCC to deploy newly identified E-rate program funding to boost library broadband access and alleviate historic shortfalls in funding for internal connections. In response to the FCC’s March Public Notice, the ALA seeks to leverage existing high-speed, scalable networks to increase library broadband speeds, improve area networks and further explore cost efficiencies that could be enabled through new consortium approaches. ALA also favors using much of the short-term funding to support internal connections—particularly for applicants that have not received these funds in recent years.

In May, library and school broadband took center stage at a day-long FCC workshop on E-rate modernization. The workshop convened library professionals, education administrators, non-profit leaders and local government officials to discuss a host of connectivity topics, including the importance of internal connections in libraries and schools; the need to provide “last mile” connections to library patrons and students living in underserved areas; the challenges and benefits of collective internet access and network services purchasing; and the challenge of improving technical assistance services in libraries and schools. The workshop afforded the library community an additional opportunity to offer our perspectives and guidance to the FCC as it continues its E-rate modernization proceeding.

In March, the Federal Communications Commission dived into rural broadband needs and challenges during an all-day workshop that took place in Washington, D.C. The workshop brought together educators, decision makers, policy and technology experts, and telecommunications leaders to help the FCC generate policies that will impact high-speed internet deployment in rural, high-cost areas. Maine State Librarian Linda Lord discussed the role of libraries in rural communities on a panel highlighting the critical need for high-speed broadband in rural areas for individual consumers, businesses, and community anchor organizations.

In February, ALA responded to Federal Communications Commission (FCC) Chairman Wheeler’s E-rate speech, where he emphasized the crucial role of libraries as the “community on-ramp to the world of information.” Since then, OITP staff have been in contact with FCC

officials every week to advocate for ALA's position, including multiple in-person meetings at FCC headquarters. In March, the Federal Communications Commission released a Public Notice, warranting further public input to help the Commission determine the best path forward on E-rate. In ALA's comments and throughout the process we have sought input and feedback from a wide range of librarians and expect to do so again through the guidance of the ALA E-rate Task Force, other ALA member leaders, and expert consultants. Comments were submitted and reply comments in April. OITP leaders have had several meetings with FCC commissioners and staff, both as ALA, and as a member of inside-the-beltway coalitions.

### **ALA Joins Organizations Concerned About Rural Issues in Letter to FCC**

On March 5, 2014, ALA signed on to a letter urging the FCC to move forward as quickly as possible to implement a Connect America Fund (CAF) mechanism for small, rural, rate-of-return-regulated carriers that will provide sufficient and predictable support for broadband-capable networks across all of rural America. In total, 37 organizations signed the letter including the American Farm Bureau Federation, the National Association of Federally Impacted Schools, and NTCA-The Rural Broadband Association, among others.

### **ALA Participates in U.S. Copyright Office Orphan Works Roundtable**

In March, OITP participated in a U.S. Copyright Office roundtable on orphan works, which are works still protected by copyright whose rights holder or author is not known or cannot be found. Users of these works—libraries, educators, private companies, other creators, the general public—want to get permission to use these works in ways that go beyond fair use or other user exceptions. Moving forward, the U.S. Copyright Office is now accepting public comments on orphan works legislation. The window for public comments closes April 14, 2014.

### **Jim Neal Represents Libraries at House Judiciary Subcommittee Copyright Hearing**

In early April, the U.S. House Judiciary Subcommittee on Courts, Intellectual Property and the Internet held a hearing entitled, "Preservation and Reuse of Copyrighted Works." The hearing convened a panel of witnesses representing both the content and user communities to discuss a variety of copyright issues, including orphan works, mass digitization and specific provisions of the Copyright Act that concern preservation and deteriorating works. Representing the library community on the panel was Jim Neal, Columbia University librarian and vice president for Information. Neal's statement discussed fair use in the context of library preservation, the relationship between fair use and the library exceptions language of Section 108 of the Copyright Act, and the issue of orphan works. His statement was endorsed by the Library Copyright Alliance (LCA), which includes ALA, the Association of Research Libraries and the Association of College and Research Libraries. LCA also submitted a statement to the Subcommittee.

### **ALA Participates in IMLS Hearing on Libraries and Broadband**

On April 17, 2014, leaders from the American Library Association participated in "Libraries and Broadband: Urgency and Impact," a public hearing hosted by the Institute for Museum and Library Services (IMLS) that explored the need for high-speed broadband in American libraries. Larra Clark, director of the ALA Program on Networks, and Linda Lord, ALA E-rate Task Force Chair and Maine State Librarian, presented on two panels. Federal Communications Commission

Chairman Thomas Wheeler made opening remarks at the hearing, and expert panelists from across the library, technology, and public policy spectrum will explore the issue of high-speed broadband in America's libraries. IMLS Director Susan H. Hildreth chaired the hearing, along with members of the National Museum Services Board including, Christie Pearson Brandau of Iowa, Charles Benton of Illinois, Winston Tabb of Maryland, and Carla Hayden also of Maryland.

### **OITP Expands Policy Staff**

In March, Charlie Wapner began work as an information policy analyst for OITP. Charlie will work on a broad range of topics that includes copyright, licensing, telecommunications and E-rate, and provide support for our new *Policy Revolution!* initiative sponsored by the Bill & Melinda Gates Foundation. Charlie comes to the American Library Association from the Office of Representative Ron Barber (D-AZ) where he was a legislative fellow. Earlier, Charlie also served as a legislative correspondent for Representative Mark Critz (D-PA). Charlie also interned in the offices of Senator Kirsten Gillibrand (D-NY) and Pennsylvania Governor Edward Rendell. After completing his B.A. in Diplomatic History at the University of Pennsylvania, Charlie received his M.S. in public policy and management from Carnegie Mellon University.

### **Abby Lull Joins OITP as Research Associate**

In March, OITP announced the appointment of Abby Lull as research associate for the organization's Office for Information Technology Policy (OITP). As part of the OITP Fellows Program, Abby will work on copyright and licensing issues, as well as other aspects of the OITP portfolio. Abby is a recent master's graduate of the College of Information Studies at the University of Maryland, where she concentrated on copyright and intellectual property issues in information access and management. The OITP Fellows Program serves to draw on nationally recognized researchers, practitioners and policy advocates in library information sciences or allied areas to strengthen the OITP's involvement in national policy discussions.

### **OITP, OIF Join SXSW Technology Policy Discussions**

ALA leaders joined technology policy conversations at the South by Southwest EDU and Interactive conferences in Austin from March 7-11, 2014. ALA staff and other library organizations engaged attendees, panelists, policy-makers, startups, and venture capitalists about the ongoing importance and relevance of libraries and librarians to the tech industry. Privacy and the "internet of things" were among the topics on the agenda for the ALA Office for Intellectual Freedom (OIF) and the Office for Information Technology Policy. ALA also joined members and sister library organizations at the joint "Innovative Booth for Libraries." SXSWi is a premier technology and policy conference featuring some of the world's most forward-looking thinkers, emerging technologies, and inspiring digital creators. OIF Director Barbara Jones spoke on a panel about high school students and privacy issues, while OITP Program Director Larra Clark spoke on the panel "Innovating Policy for the Internet of Things."

### **ALA Joins WiFi Coalition**

The American Library Association has joined WiFiForward, a new coalition calling on policymakers to unleash unlicensed spectrum for Wi-Fi and other uses. Recent analyses indicate

that Wi-Fi in our homes, businesses, libraries and schools is becoming congested by a deluge of data from an increasing number of devices, applications and services connecting to the Internet without wires. WifiForward is an ad hoc group of companies, organizations and public sector institutions working to alleviate the Wi-Fi spectrum crunch. Go to [www.wififoward.org](http://www.wififoward.org) for more information.

### **ALA Joins Internet Archive in Filing Supreme Court Amicus Brief**

In March, the American Library Association and the Internet Archive joined forces to file a “friend of the court” brief in *David Leon Riley v. State of California* and *United States v. Brima Wurie*, two Appellate cases joined at the Supreme Court to examine the constitutionality of cell phone searches without a warrant after police arrests. In the amicus brief, both nonprofit organizations argue that warrantless cell phone searches violate privacy principles protected by the Fourth Amendment. In the brief, the Internet Archive and the American Library Association argued that reading choices are at the heart of the expectation of personal privacy guaranteed by the Fourth Amendment. Allowing police officers to rummage through the smartphones of arrestees is akin to giving government officials permission to search a person’s entire library and reading history.

### **Four Local Libraries Honored for Offering Cutting-edge Services**

Four libraries were recognized in February by the American Library Association (ALA) for offering cutting-edge technologies in library services, honoring programs in Edmonton, Alberta, Canada; Bridgewater, New Jersey; Raleigh, North Carolina; and University Park, Pennsylvania. The recognition, which is presented by the ALA Office for Information Technology Policy and the Library & Information Technology Association, showcases libraries that are serving their communities using novel and innovative methods. Libraries or library service areas selected will be highlighted through various ALA publications and featured in a program at the 2014 ALA Annual Conference.

### **ALA Presents at Digital Book World Conference**

On January 13, 2014, ALA held a pre-conference workshop at the 2014 Digital Book World conference in New York. Featured in this workshop were Nora Rawlinson of EarlyWord, Wendy Bartlett of the Cuyahoga County Public Library, Maja Thomas, a former Senior Vice President of Hachette Book Group, and ALA OITP Program Director Larra Clark.

### **OITP Director Discusses Ebooks at Connecticut Meeting**

In March, OITP director Alan Inouye participated in the Connecticut State Library’s Ebook Symposium, a one-day event where library and publishing experts explored the current state of ebook affairs and the future of ebook lending for libraries, publishers, and readers. As a presenter at the statewide ebook conference, Inouye discussed the large number of challenges faced by libraries working to meet patron demands for ebooks, including concerns related to fair pricing, equitable access to ebook titles, digital preservation, privacy, digital rights management and accommodations for readers with limited vision.

## OITP Takes Over Twitter for Teen Tech Week

On March 13<sup>th</sup>, technology policy leaders from OITP discussed digital learning via the Young Adult Library Services Association's @Yalsa Twitter account. As part of Teen Tech Week, OITP joined several businesses, nonprofits, library organizations and Internet companies in highlighting the digital tools, resources and services that libraries offer to teens and their families. OITP covered a variety of topics during the all-day social media event, including current technology policies, internet filtering, copyright fair use, internet access and net neutrality. Nearly 300 users (with more than 690,000 followers combined) participated in the chat. Overall, the tweets in the day-long event made close to 4,000,000 impressions.

## **OFFICE OF GOVERNMENT RELATIONS (OGR)**

### **Presidential Contender Sen. Jim Webb to address ALA Annual Conference**

The midterm elections are steadily approaching, and libraries need to be prepared. Want to learn more about how the November elections will affect libraries? Don't miss this year's "Washington Update" session at the ALA Annual Conference, where former Virginia Senator Jim Webb will detail the upcoming national election season and the ways that libraries and library funding will be affected. Called a "potential presidential candidate" by *The Washington Post*, Webb has been a combat Marine, a counsel in Congress, an assistant secretary of defense and Secretary of the Navy, an Emmy-award winning journalist, an accomplished filmmaker and an author of ten books. The session takes place on Saturday, June 28, 2014, from 8:30–10:00 a.m. in the Las Vegas Convention Center N259/261.

### **ALA Active on Surveillance and Privacy Issues**

ALA continues to work closely and aggressively in tandem with partners in several coalitions to reform the multiple statutes that provide the government with various forms of surveillance and investigatory authority. In May, the House of Representatives passed a version of the USA FREEDOM Act intended to end the "dragnet"-style collection of Americans' phone records by the government, but did not go far enough to protect citizens' privacy. As a result, ALA President Barbara Stripling released a statement responding to the passage of the USA Freedom Act.

In June, [ALA joined more than 30 other civil liberties and privacy organizations](#) in writing to key Members of the Senate to support the modification of the USA FREEDOM Act so that it truly ends the "bulk collection" of telephone business records, and builds transparency and additional oversight into court-approved surveillance activities. The Senate Judiciary Committee is expected to take up the measure within two to three weeks. In addition, the ALA Washington Office sent legislative action alerts to nearly 5,000 subscribers in 22 key Congressional districts urging them to ask their Representative to cosponsor the Email Privacy Act, a bill that updates the Electronic Communications Privacy Act (ECPA) to require a warrant to search Americans' stored emails, texts, Facebook pages and cloud-stored data of all kinds.

Earlier in January, ALA President Barbara Stripling released a statement regarding a speech President Barack Obama made on the National Security Agency surveillance program. In her statement, Stripling called for permanent changes to the NSA data collection program and repeated her support for the USA Freedom Act, a bill that will improve the balance between terrorism prevention and personal privacy protection.

In February, ALA participated in the Day We Fight Back, a day when thousands of websites hosted banners urging people to call Congress to stop mass surveillance.

### **Hundreds Gather for 40<sup>th</sup> Annual National Library Legislative Day**

Hundreds of library supporters from across the country met with their members of Congress from May 5–6, 2014, to advocate for library funding during the American Library Association's 40<sup>th</sup> annual National Library Legislative Day. Senator Angus King (I-ME) jumpstarted the event by addressing library advocates at the opening briefing, which took place on Monday, May 5, 2014, at the Liaison Capitol Hill Hotel in Washington, D.C. Additional speakers included Maine State Librarian Linda Lord; Gabriel Rottman, legislative counsel for the American Civil Liberties Union; Shawn Daugherty, assistant director of SPARC; and Peter Jaszi, professor of law at the American University Washington College of Law. Library supporters who could not attend the Washington meetings connected virtually with legislators via phone calls, emails and social media platforms.

During National Library Legislative Day, the American Library Association named Mary Lynn Collins, a library trustee from Frankfort, Ky., the winner of the 2014 White House Conference on Library and Information Services (WHCLIST) Award. The award, which is given to a non-librarian participating in National Library Legislative Day, covers hotel fees in addition to a \$300 stipend to reduce the cost of attending the event.

### **Workforce Investment Act Moves Forward**

In May, the U.S. House and U.S. Senate have drafted “Workforce Innovation and Opportunity Act,” a bill on workforce investment, which acknowledges the work libraries do to help the public gain important employment skills and find jobs—and the legislation allows libraries to be paid for these efforts. Thanks to their continuous work, libraries are part of this bill. We hope the Senate will take up this House-Senate WIA Agreement for a vote in mid-to-late June, then it would move to the House. Library advocates are encouraged to sign up for the ALA Washington Office’s Legislative Action Center for advocacy opportunities to help push this legislation forward: <http://ala.org/takeaction>.

### **ALA Responds to House Budget Proposal that Dismisses Role of IMLS**

On April 1<sup>st</sup>, ALA President Barbara Stripling responded to the new budget released from Representative Paul Ryan (R-WI), the House Budget Committee Chairman. The proposal denounces the critical role that the Institute of Museum and Library Services plays in supporting civic engagement, literacy and lifelong learning in more than 123,000 libraries nationwide. Rep. Ryan recommends that the federal government not have a role in libraries and that Congress shift

the federal agency's responsibilities to the private sector in his 2015 fiscal year budget resolution.

In Rep. Ryan's own state of Wisconsin, more than 65 percent of libraries report that they are the only free access point to the Internet in their communities. Just blocks from Rep. Ryan's Wisconsin office, more than 716,000 visitors used the Hedberg Public Library in Janesville, Wisconsin to access library computers and research databases, check out books and receive job training in 2013.

### **Spending Bill Passed for 2014 Fiscal Year**

In January 2014, President Obama signed a \$1.1 trillion spending bill to fund the U.S. federal government through September 2014. The legislation partially restores funding to the Library Services and Technology Act (LSTA)—the primary source of annual funding for libraries in the federal budget—that were dramatically cut in the 2013 fiscal year under sequestration. The total amount appropriated for LSTA increased from \$175,044,000 to \$180,909,000 for fiscal year 2014.

President Obama's spending bill included language that supports open access—a win for libraries and public access to federally-funded information. While we celebrate this milestone in open access, we are also aware that we have not gone far enough; additional provisions found in the Fair Access to Science and Technology Research Act would make this effort complete.

### **Federal Library Funding Cut in Proposed Budget**

In March, President Barack Obama released his budget request for the 2015 fiscal year. The proposed budget for the LSTA Act falls \$2 million short from the \$180.9 million enacted by the U.S. Congress for the 2014 fiscal year. The big hit came to the state grant program, with slight increases to the set aside for Native Americans and Hawaiians and the National Leadership grants.

On a conference call with stakeholders, Institute of Museum and Library Services Director Susan Hildreth discussed the Laura Bush 21st Century grants programs, saying that her agency is working on a National Continuing Education Platform so library employees can continue their education around new services and technologies.

### **ALA Joins in Supporting the FOIA Oversight and Implementation Act of 2014**

In February, ALA united with 26 other organizations in a letter to members of the House of Representatives urging them to vote for H.R. 1211, the FOIA Oversight and Implementation Act of 2014. H.R. 1211 is a bipartisan bill that would “amend the Freedom of Information Act (FOIA) to promote greater government transparency and accountability.” On February 25, 2014, the bill passed the House and a day later was sent to the Senate where it was referred to the Senate Judiciary Committee.

### **ALA Honors Leaders with Freedom of Information Awards**

During the 16th Annual Freedom of Information Day in Washington, D.C., ALA awarded the James Madison Award to President Obama's Review Group on Intelligence and Communications Technologies, the body of intelligence and legal experts tasked with assessing the United States' surveillance practices. The James Madison Award honors, celebrates and recognizes groups and individuals who have championed for public access to government information. Additionally, ALA awarded the grassroots advocacy Eileen Cooke Award to the Open Government Project of the American Civil Liberties Union of New Jersey. ALA Immediate Past President Maureen Sullivan presented the awards at the Freedom of Information Day event.

### **Congress Introduces Harmful Open Access Act**

In March, Reps. Lamar Smith (R-TX) and Larry Bucshon (R-IN) introduced the Frontiers in Innovation, Research, Science and Technology Act (H.R. 4186), a bill that challenges public access to tax-payer funded research. ALA stands with the Scholarly Publishing and Academic Resources Coalition in opposing Section 303 of this bill, a provision that would create unnecessary obstacles to the public's ability to access research funded by tax-payers. ALA is encouraging members to contact their representatives to express their opposition to a bill that would delay the public's right to information.

### **ALA Recognizes Rep. Holt's Leadership**

We are sad to report that Representative Rush Holt (D-NJ) announced his retirement from the U.S. House of Representatives in February, ending 16 years of service. The American Library Association expresses its deepest appreciation for the distinguished work of Rep. Holt, a leader who has worked tirelessly to support public, academic and school libraries nationwide. Rep. Holt introduced the Workforce Investments through Local Libraries Act to integrate libraries into job training efforts. Rep. Holt has also been a consistent supporter of the Library Services and Technology Act, the only federal funding program exclusively for libraries.



**Public Library Association**  
a division of the American Library Association

# Strategic Plan

2014-2017

*To be reviewed and approved by the  
PLA Board of Directors*

*June 2014*

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## Overview

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In fall 2013, the PLA Board of Directors reviewed PLA's strategic plan and agreed that overall the plan remained relevant, but could benefit from a progress review and refinement in focus for a short-term (two to three year) extension. Last updated in 2010, the plan influenced the work of the association over the past few years and led to many successful initiatives under four goals—Advocacy & Awareness, Leadership & Transformation, Literate Nation, and Organizational Excellence (see Appendix B).

At the 2014 ALA Midwinter Meeting, the Board convened a meeting of 40 PLA leaders, including current Board members, committee chairs, PLA past-presidents, and other PLA members. With facilitation from PLA Board members Pam Sandlian Smith and Portia Latalladi, the group reviewed progress on the existing plan and discussed critical issues facing public libraries today. As follow-up, Pam facilitated a secondary discussion at the Spring 2014 meeting of the Board. Many thanks to Pam and Portia for their extra efforts and insight.

Through all these discussions, consistent themes emerged that centered on two of the four PLA goal areas: Advocacy & Awareness and Leadership & Transformation. These themes also surface in membership surveys and program evaluations. The resulting revised strategic plan builds on PLA's successes to date and focuses the association for the next three years. The desired outcome of the planning process is to guide and create clarity on how PLA should invest its valuable and limited resources to meet the future needs of its members and other stakeholders.

The revised strategic plan includes the following:

- A set of "Assumptions about the Future" for the public library profession the association represents, with revisions made in June 2014. (Appendix A);
- A list of relevant factors in the long-range horizon (10+ years into the future), including a core purpose, core values, Big (hairy) Audacious Goal (BHAG), and a vivid description of future success;
- Goal areas that identify where PLA will direct its energy in the next three years. The goal areas focus on outcomes beneficial to the association and its members based on the 2013-2014 discussions.
- A set of strategic objectives in each goal area that set a measurable target .
- Possible strategies that identify actions the association could undertake in the next 1-2 years in order to achieve each goal area.

Adoption of this next iteration of the plan is an affirmation of the general intent and direction articulated by the vision, goals, and objectives. The leadership of PLA views strategic thinking and planning as an ongoing process within the organization. This is not a strategic planning "project." Therefore progress toward achieving the plan's objectives will be assessed annually, and the plan will be updated based on achievement and the changing needs of members and stakeholders..

## **10+ Year Planning Horizon**

### **Core Ideology & Envisioned Future**

**Core ideology** describes an organization's consistent identity that transcends all changes related to its relevant environment. It consists of two elements - **core purpose** – the organization's reason for being – and **core values** – essential and enduring principles that guide the organization. **Envisioned future** conveys a concrete yet unrealized vision. It consists of a **Big (hairy) Audacious Goal (BHAG)** – a clear and compelling catalyst that serves as a focal point for effort – and a **vivid description** – vibrant and engaging descriptions of what it will be like to achieve the BHAG.

#### **Core Ideology**

**Core Purpose:** To strengthen public libraries and their contribution to the communities they serve.

**Core Organizational Values:**

PLA is dedicated to:

- Visionary Leadership.
- Member Focus.
- Integrity and Transparency.
- Openness, Inclusiveness, and Collaboration.
- Excellence and Innovation.

#### **Envisioned Future**

**Big Audacious Goal (BHAG):** The public library is the most valued asset in every community.

**Vivid Description of a Desired Future:**

We envision a future where public libraries are recognized as key to building vibrant communities and sustaining a strong democracy. The value of libraries is so deeply ingrained that they are viewed as essential to community vitality and are readily and appropriately funded. The library is an integral member of the community partnering with external community organizations, including service agencies, and acting as liaison between community and government. The public seeks out the library for myriad reasons; and in response the library has shifted its institutional and professional orientation from internal to external, actively engaging its community members to understand (and respond to) their needs and aspirations.

The library provides a pathway to a better future for all community members by serving as the principal destination for individual learning, enrichment, and economic opportunity. Community members are attracted by the library as a learning space where they will find expert assistance, relevant resources and tools for research, content sharing and creation, and opportunity for cultural enrichment. By also providing critical literacy services, enriching formal education, and supporting lifelong learning, public libraries are learning spaces that make America a literate nation. They are an integral component of a successful educational system.

Both the library's virtual presence and physical space are important, and community members make ample use of the library's cutting-edge technology and learning spaces to actively engage library resources from home and on-the-go. By providing free access to government information, e-government services, employment assistance and more, the library plays an invaluable role in community members' lives.

Finally, the Public Library Association (PLA) is an essential partner in transforming libraries and empowering librarians, with membership viewed as a necessity for a successful library career. The Association is instrumental in helping libraries respond to the needs of their communities. Moreover, PLA leads the profession, intuiting trends in an ever-changing environment and matching member needs with superior services. Every public library worker and trustee looks to PLA as a critical educational and training resource. PLA membership represents 100% of North America's public librarians and public library workers. Members are actively engaged with the association and benefit from the various educational and networking opportunities.

## **Three Year Planning Horizon (2014-2017) Outcome-Oriented Goals and Objectives**

*The following are the PLA's goal areas for the next three years. These outcome statements define what will constitute future success. The achievement of each goal will move the association toward realization of its BHAG. The goals listed are considered of equal importance and are not necessarily in priority order. Objectives and Strategies provide direction and actions on how the organization will accomplish its articulated goals. Objectives are considered in the 1-2 year planning horizon while Strategies are considered within the three year planning horizon. Success toward achieving the goals and accomplishing strategies are reviewed annually by PLA leadership. The strategies for each objective will be further developed by volunteers and staff and will be incorporated into the plan.*

### **Goal: Advocacy & Awareness**

Goal Statement: PLA plays a major role in public library advocacy and in influencing public perception about the library.

*Objective (1):*

Enhance perception of public libraries through a public awareness initiative.

*Objective (2):*

Enhance the effectiveness, scope and awareness of PLA/ALA's advocacy resources.

*Objection (3):*

Create new advocacy tools and resources through the performance measurement initiative.

*Objective (3):*

Encourage and equip librarians for participation in all levels (federal, state, local) of public library advocacy.

### **Goal: Leadership & Transformation**

Goal Statement: PLA is a leading source for learning opportunities to advance transformation of public libraries and helps to position the library's institutional and professional orientation from internal to outward toward the community.

*Objective (1):*

Help define and support the transition of public libraries to learning spaces.

*Objective (2):*

Continue to increase leadership development and training opportunities designed to support public library staff in leading change and transforming library service.

*Objective (3):*

Increase opportunities to share best practices and next practices in public libraries with a focus on librarians as community leaders who play a critical role in addressing community priorities. .

**Objective (4):**

Integrate the shift in library orientation from internal to external into PLA training and resources.

**Objective (5):**

Influence Library School curriculum that supports public librarians.

**Goal: Literate Nation**

Goal Statement: PLA is a leader and valued partner of public libraries' initiatives to create a literate nation.

**Objective (1):**

Continue to increase awareness of the many types of literacy necessary for success for 21<sup>st</sup> century skills development and success.

**Objective (2):**

Continue to enhance public libraries' abilities to provide literacy services in their communities.

**Goal: Organizational Excellence**

Goal Statement: PLA is positioned to sustain and grow its resources to advance the work of the association.

**Objective (1):**

Maintain a financially stable operating model.

**Objective (2):**

Increase the number of income generating products and programs.

**Objective (3):**

Understand and adapt to new trends and models in association organization and membership.

**Objective (4):**

Enhance relationships with library organization partners as well as with non-library organization partners.

## **Appendix A**

### **Assumptions about the Relevant Future**

*In order to make progress toward the Envisioned Future, an association must constantly anticipate the strategic factors likely to affect its ability to succeed and to assess the implications of those factors. This process will help PLA to constantly recalibrate its view of the relevant future and provides a basis upon which to update the strategic plan. The outcome-oriented goals of the strategic plan are based on this foresight; therefore; annual review of these “Assumptions” is an appropriate method of determining and ensuring the ongoing relevance of the strategic plan.*

#### **Assumptions** *(Updated June 2014)*

#### **Economic Factors and Global Business Environment**

1. While the previous dire economic conditions have lessened, library budgets will continue to be constrained with more competition for the same or shrinking pot of funds and increased expectation for accountability.
2. Private fundraising, as well as other forms of alternative funding streams, will become more and more necessary.
3. Libraries must be able to demonstrate return on investment (ROI) to the public and to decision-makers.
4. Current sources of state, local, and/or federal funding for public libraries may change, shrink or go away.
5. There is increasing skepticism toward public funding of libraries as a public service, which is reflective of increasing skepticism of all public services.
6. Library services will continue to be viewed as discretionary as opposed to schools, which are viewed as mandatory.
7. There will be an increase in partnerships and in pooled and/or shared resources in response to smaller overall budgets.
8. The economics around the publishing industry and the transition to electronic content will continue to change, impacting the delivery of services at the library.

9. There will be limits to the amount of private funding available along with more competition for those dollars.

## **Legislation and Regulation**

1. The legal environment will require more time, energy, and expertise.
2. Copyright and digital licensing will continue to evolve and be volatile.
3. Confidentiality/privacy will become more complex and will affect patron use, records, maintenance, and requirements for registration, data collection and marketing
4. Employment law will become more complex and require greater management and increased overhead costs.
5. Funding laws and regulations on tax limitations will threaten funding.
6. Changes in immigration laws could impact our current and future immigrant population.

## **Social Values and Politics**

1. Stratification of social values will continue, creating more tension between conservative and liberal views.
2. National, state, and local political agendas will change and the public's support for those political agendas will continue to fluctuate.
3. Public libraries will remain a symbol of democracy providing a strategic opportunity for growth and financial support.
4. Libraries will continue to focus on not only having a seat at the decision-making table but setting the table.
5. The library as a place for the community to congregate will continue to grow.
6. The library as a place for content creation will continue to grow.
7. Definitions of family will continue to change.
8. Libraries will continue to be viewed as "in loco parentis."
9. The growing national volunteerism movement could translate to potential value for libraries.
10. There is increased expectation that libraries will incorporate sustainable practices into their operations.
11. The library will have a greater role in civic discourse.

12. Reading will continue to be a critical skill to succeed in life.
13. The library's role in support of lifelong learning will continue to increase.

## **Demographics**

1. The need for a more diverse library staff will increase in order to reflect changing communities.
2. Library staff will continue to stay in the workforce longer, thereby reducing opportunity for new library staff.
3. The value of interacting with others will continue, but the tools and approaches will continue to change (i.e. face-to-face versus online social networking tools, etc.).
4. Trends in the way education is delivered will continue to affect the role of and the services provided by public libraries.
5. New immigrants from countries without a public library tradition will need assistance in understanding the role and services of the American public library.
6. The socioeconomic gap will continue to grow and the income level defining poverty will continue to rise.
7. The general population will live longer and be more active.
8. The next generation will not be better off than their parents.
9. More and more people will use the library's technology resources.
10. Changes in demographics will influence the ways people interact and behave in public spaces, including public libraries.

## **Technology and Science**

1. Technology will allow libraries the opportunity to attract and serve new client groups.
2. Technology will affect everything libraries do.
3. Technology training will continue to be a challenge.
4. Online social networking will continue to evolve.
5. There will be a greater interest and demand for user-generated content.
6. Patrons will expect multiple access modes to the library, different for each person.
7. Libraries will continue to be a technology safety net for a large percentage of the population.
8. There will be a greater need for assistive technology.
9. Technology will give libraries the opportunity to provide services on a one-to-many basis.
10. As technology expands there will be changes in the way people access personal health and government records.

11. As state and local governments downsize there will be more requirements for libraries to provide access to eServices.
12. Reliance on technology for everyday life will continue to grow.
13. Technology will allow libraries to offer customized services.

## **Professional Competition and Structure**

1. There are major competitors that have a huge penetration in the market and they will continue to grow.
2. There will be a continued threat to our status as information providers and less understanding by the public of the difference between libraries and their competitors.
3. The traditional structure of libraries makes it harder for them to change.
4. The nature of our work with the public is changing and the traditional staffing structure will have to be adjusted.
5. In order to remain competitive libraries will need to have a more external, customer-focused orientation.
6. Many library competitors will continue to have better resources and larger budgets.
7. Our funders will know organizations like Google and Amazon and what services they provide better than they know libraries.
8. There may be a tension between our need to market and collect critical user data and the expectation that we should not use public funds for marketing.
9. There may be less enthusiasm for the public library as a public good.
10. Due to local funding structures, it will be more difficult to get economies of scale in financing of libraries, in comparison to our national and international competition.
11. Due to libraries' financial structure, it will be difficult for libraries to invest in research and development.
12. Libraries will continue to be conflicted between maintaining a nonprofit business model and providing services.
13. Libraries will continue to be constrained by the ability and interest of the vendors in delivering solutions.
14. There may be a tension between our need to collect critical user data and librarians' value of privacy.

15. There will be an increased emphasis on partnerships to extend the library's reach and to cooperatively address community goals.

## **Appendix B (Attached)**

### **Overview of Key Accomplishments, PLA Strategic Plan 2011-2013**

I have two additional suggestions:

Goal: Leadership & Transformation

Objective 1

Add the word "define"

Help **define and** support the transition of public libraries to learning spaces.

Add Objective 5

Contribute suggestions to influencing Library School curriculum that supports public librarians.

## Strategic Plan 2011

2012

2013



- TtP2.0 Online
- PLA Advocacy Website
- Start of Edge Initiative



- TtP2.0 Train-the-Trainer to increase reach
- EL team develops public awareness resource



- Performance Measurement Task Force
- ECRR Research
- OITP Policy Revolution Initiative



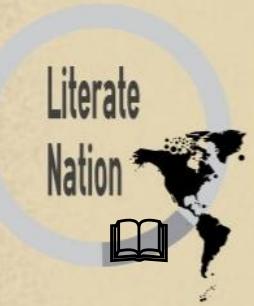
- Leadership Committee Created
- Start of Edge Initiative



- Successful Proposal to IMLS for Pilot Leadership Training**



- Inaugural Leadership Academy
- IMLS Proposal - Leadership Training
- Libraries Transforming Communities Initiative



- ECRR 2<sup>nd</sup> Edition Released
- Literacy Survey Conducted
- Literacy Webinars Launched



- Successful Proposal to IMLS for Digital Lit Training
- Financial Literacy Collaborations



- ECRR Spanish Language product
- ECRR Research
- DigitalLearn.org



- 1<sup>st</sup> Facebook Forum
- New early literacy products for sale
- PLA Dues Increase Passes



- New Sponsor Opps for PLA Conference
- Consistent Average PLA Fund Balance
- Grant funding for key initiatives secured



- Spectrum Scholars to PLA conference
- PL Online provides member opps

Source: <http://www.ala.org/pla/about/strategicplan>

**Foundation**

Governance & Committees | Conference  
 Online Learning | Continuing Education | Membership  
 Public Libraries Magazine | PL Online  
 Awards | Professional Tools | Publications & Resources  
 Partners





**TO:** PLA Board of Directors  
**RE:** Review of PLA's Boot Camp Program

**ACTION REQUESTED/INFORMATION/REPORT:**

Information/Discussion

**ACTION REQUESTED BY:**

Pam Sandlian Smith, PLA Board Member  
Carolyn Anthony, PLA President

**DRAFT OF MOTION:**

N/A

**BACKGROUND:**

This report provides the Board with background information for discussion of the PLA Results Boot Camp.

## Background

In 2001-2004, Sandra Nelson and June Garcia, as well as other trainers conducted Train-the-Trainer sessions to support the Results books which PLA/ALA was publishing during that period. Sandra Nelson, served as the Senior Editor for the Results books series as well as the author/co-author for several of the titles. June Garcia also served as a co-author of one of the titles. Each multi-day TtT session typically included a one-day workshop on the topic at hand, open to anyone interested.

In 2004, Nelson and Garcia suggested creating a longer management training workshop that would encompass all aspects of running a library, using the principles and techniques explained in the Results books. The target audience was library staff interested in moving into management/director positions or those already in those positions. The first PLA Results Boot Camp (RBC) was held September 2005 in Salt Lake City, and drew 53 people. Subsequent RBC workshops were held in other locations nationally. In 2011, in an effort to cut expenses, PLA began offering RBC at the Nashville Public Library, and it has been held annually since then 2011. Attendance at RBC is typically between 55-65. RBC is scheduled for this August and based on registration to date (46 at this writing), it will make budget and will be held as scheduled.

Nelson and Garcia update the contents with each presentation. Attendees receive a hardcopy notebook as well as access to online resources provided by Nelson and Garcia. The post-evaluations of the workshop are almost uniformly excellent. (Example: 2011: 78% thought the training overall was very good-excellent; 2012: 93%; 2013: 87%).

## RBC Learning Objectives and Target Audience

Here are the learning objectives for Results Boot Camp. At the conclusion of the four and a half day workshop, participants will know how to:

- Create a library environment that supports risk and innovation
- Understand and respond to ongoing changes in the external environment
- Develop goals and objectives that reflect local service priorities
- Identify and select effective activities that respond to service priorities
- Identify current staff workload and skills and determine the requirements to accomplish your selected activities
- Allocate collection, technology, and facilities resources to support library activities

The Boot Camp program is recommended for any public library staff involved in the creation and implementation of the library's strategic plan and service delivery, including, but not exclusive to: directors, managers, supervisors, department heads, and program coordinators.

Registration is by application to ensure an environment that fosters group interaction and active engagement.

## Financials

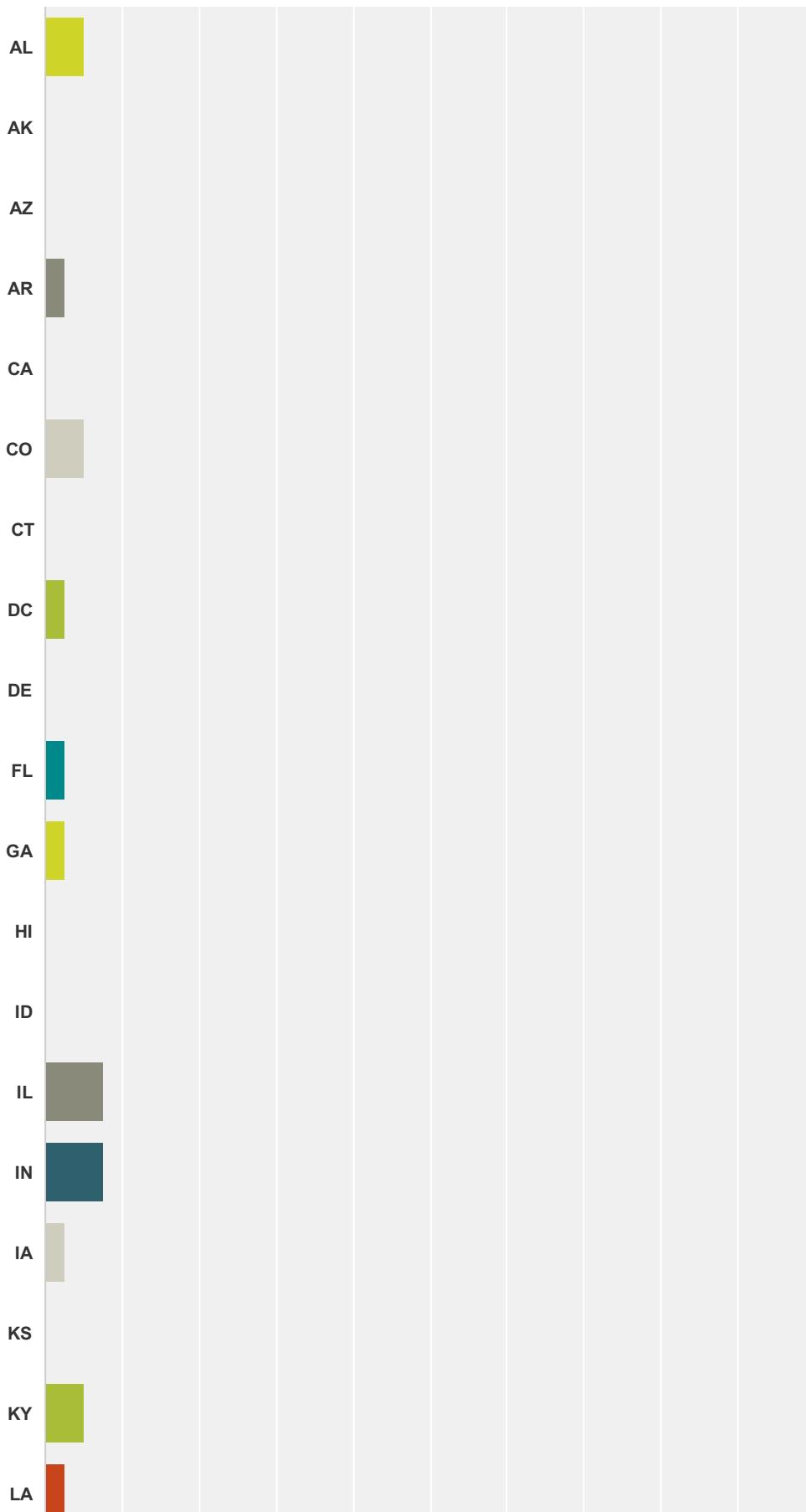
In the years 2006-2010, RBC ran a deficit. During those five years, total revenue for the program was: \$197,305 against expenses of \$388,251 and overhead of \$190,946 for a total loss over five years of \$235,932, an average net (\$47,000)/per year. After RBC was reorganized and moved to Nashville, the program was self-supporting. For the three RBC's held in 2011, 2012 and 2013, revenue was \$163,630 against expenses of \$110,930, and overhead of \$41,726 for an average net of \$3,658/year over three years.

## Evaluation

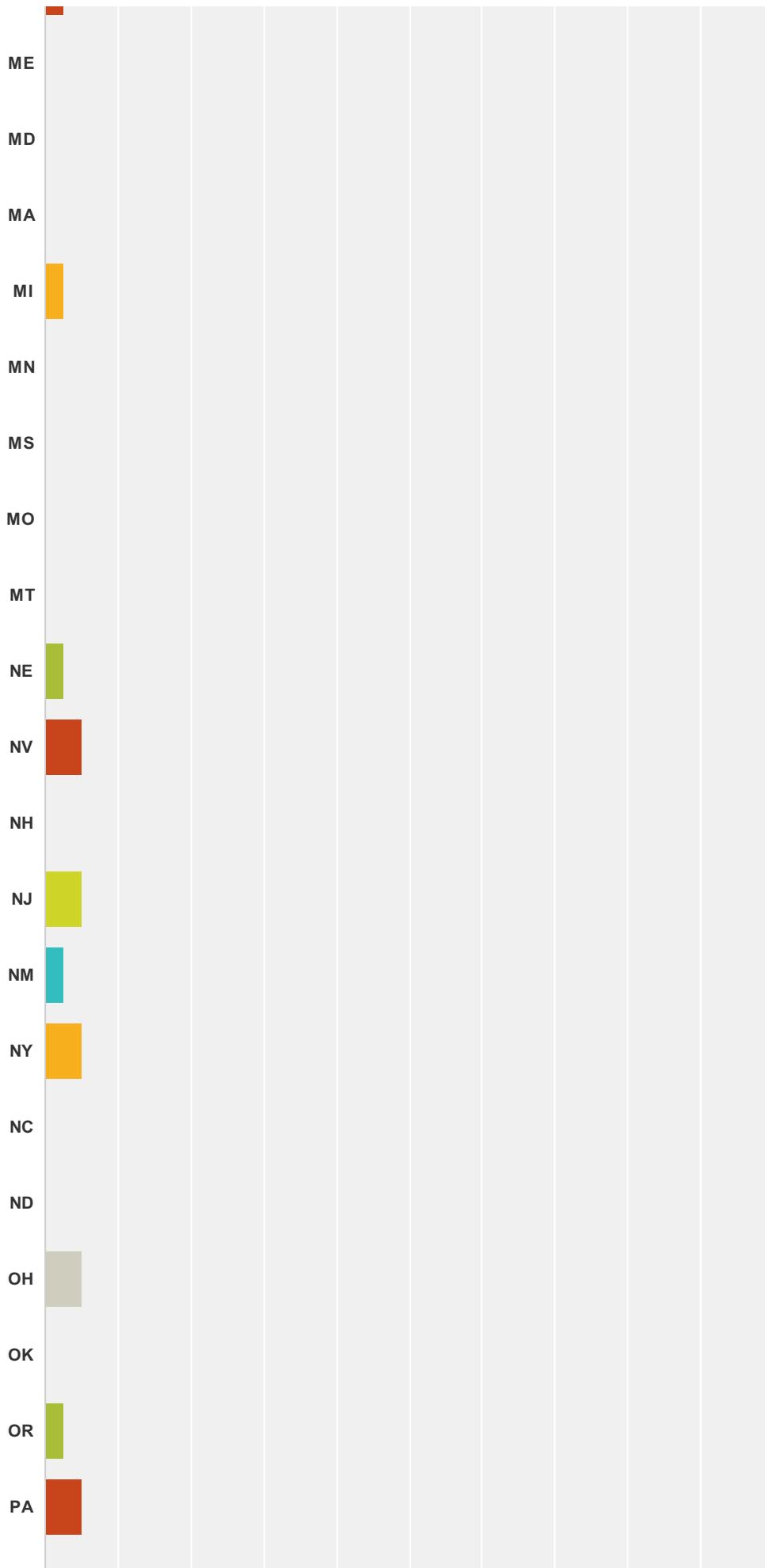
PLA just completed a survey of participants the more recent participants (classes from 2010-2013). Two hundred surveys were sent and 41 completed the surveys. Detailed results of the survey are attached to this document.

## Q1 In which state are you located?

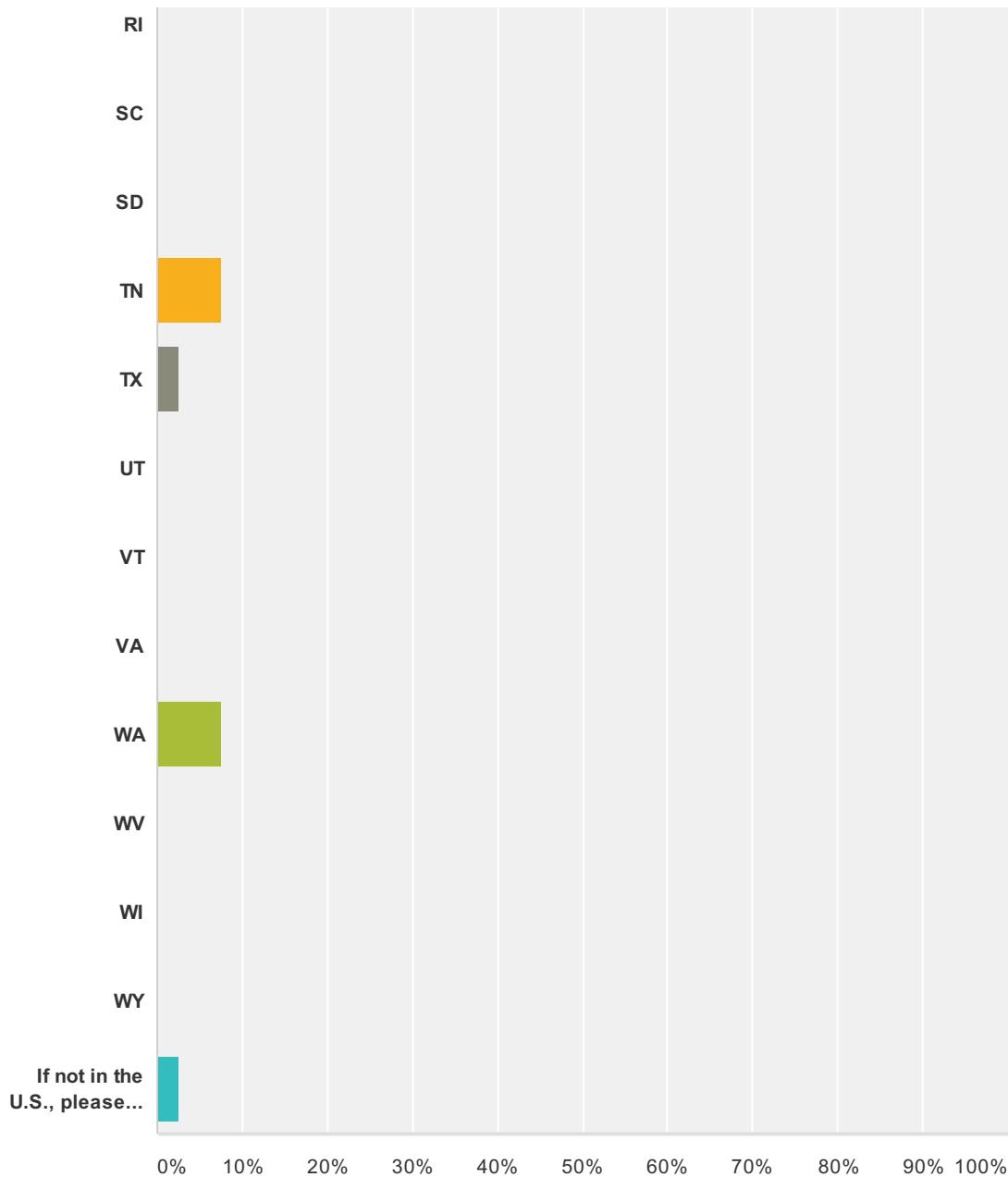
Answered: 40 Skipped: 1



## Results Boot Camp Follow-up Survey



## Results Boot Camp Follow-up Survey



Answer Choices	Responses
AL	5.00% 2
AK	0.00% 0
AZ	0.00% 0
AR	2.50% 1
CA	0.00% 0
CO	5.00% 2
CT	0.00% 0
DC	2.50% 1
DE	0.00% 0

## Results Boot Camp Follow-up Survey

FL	<b>2.50%</b>	1
GA	<b>2.50%</b>	1
HI	<b>0.00%</b>	0
ID	<b>0.00%</b>	0
IL	<b>7.50%</b>	3
IN	<b>7.50%</b>	3
IA	<b>2.50%</b>	1
KS	<b>0.00%</b>	0
KY	<b>5.00%</b>	2
LA	<b>2.50%</b>	1
ME	<b>0.00%</b>	0
MD	<b>0.00%</b>	0
MA	<b>0.00%</b>	0
MI	<b>2.50%</b>	1
MN	<b>0.00%</b>	0
MS	<b>0.00%</b>	0
MO	<b>0.00%</b>	0
MT	<b>0.00%</b>	0
NE	<b>2.50%</b>	1
NV	<b>5.00%</b>	2
NH	<b>0.00%</b>	0
NJ	<b>5.00%</b>	2
NM	<b>2.50%</b>	1
NY	<b>5.00%</b>	2
NC	<b>0.00%</b>	0
ND	<b>0.00%</b>	0
OH	<b>5.00%</b>	2
OK	<b>0.00%</b>	0
OR	<b>2.50%</b>	1
PA	<b>5.00%</b>	2
RI	<b>0.00%</b>	0
SC	<b>0.00%</b>	0
SD	<b>0.00%</b>	0
TN	<b>7.50%</b>	3

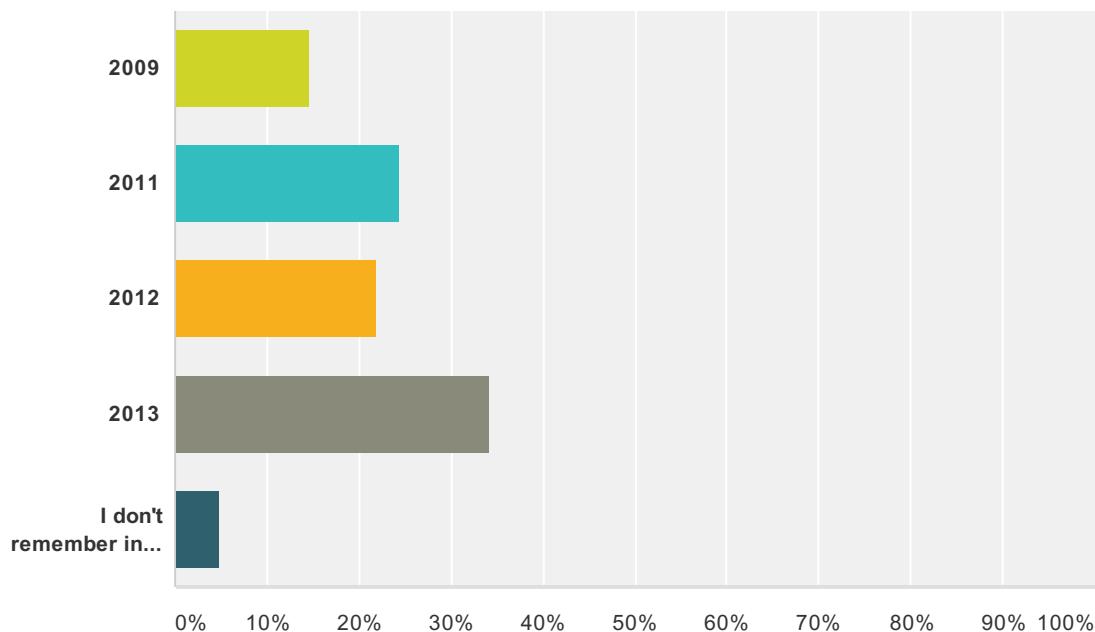
## Results Boot Camp Follow-up Survey

TX	<b>2.50%</b>	1
UT	<b>0.00%</b>	0
VT	<b>0.00%</b>	0
VA	<b>0.00%</b>	0
WA	<b>7.50%</b>	3
WV	<b>0.00%</b>	0
WI	<b>0.00%</b>	0
WY	<b>0.00%</b>	0
If not in the U.S., please specify country of origin:	<b>2.50%</b>	1
<b>Total</b>		<b>40</b>

# Results Boot Camp Follow-up Survey

## Q2 What year did you attend the PLA Results Boot Camp?

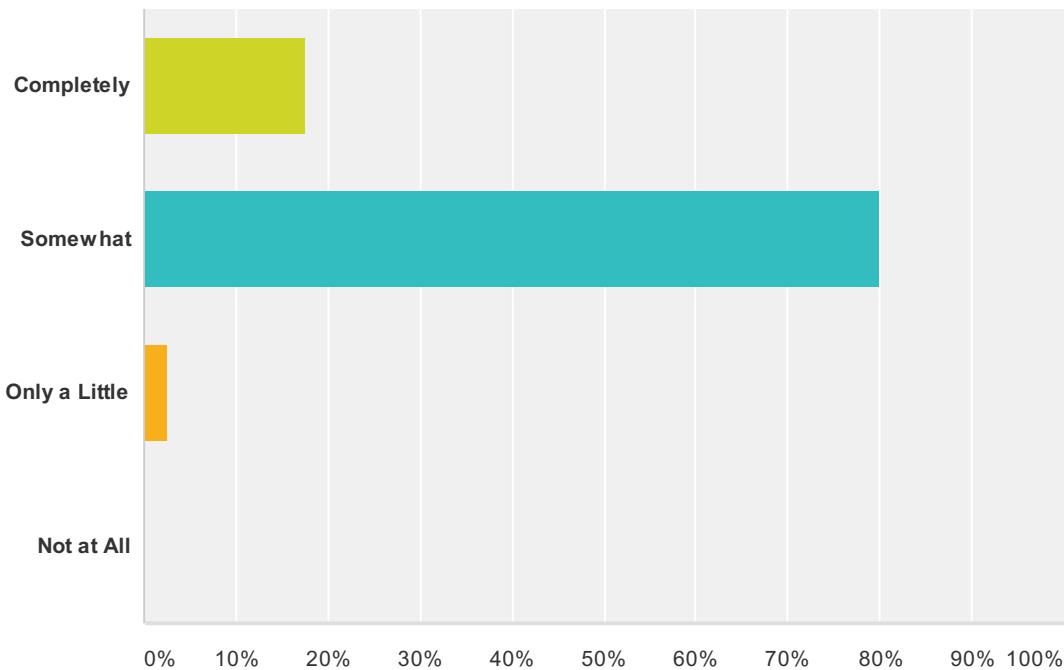
Answered: 41 Skipped: 0



Answer Choices	Responses	
2009	14.63%	6
2011	24.39%	10
2012	21.95%	9
2013	34.15%	14
I don't remember in what year it was held.	4.88%	2
<b>Total</b>		<b>41</b>

**Q3 Did what you learn in the class change the way you work?**

Answered: 40 Skipped: 1

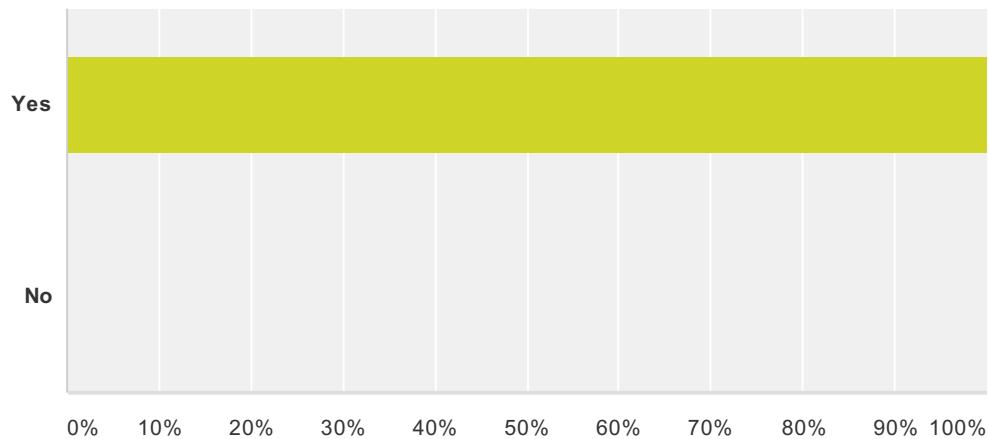


Answer Choices	Responses	
Completely	17.50%	7
Somewhat	80.00%	32
Only a Little	2.50%	1
Not at All	0.00%	0
<b>Total</b>		<b>40</b>

# Results Boot Camp Follow-up Survey

## Q4 Do you feel Results Boot Camp provided knowledge that made you better at your job?

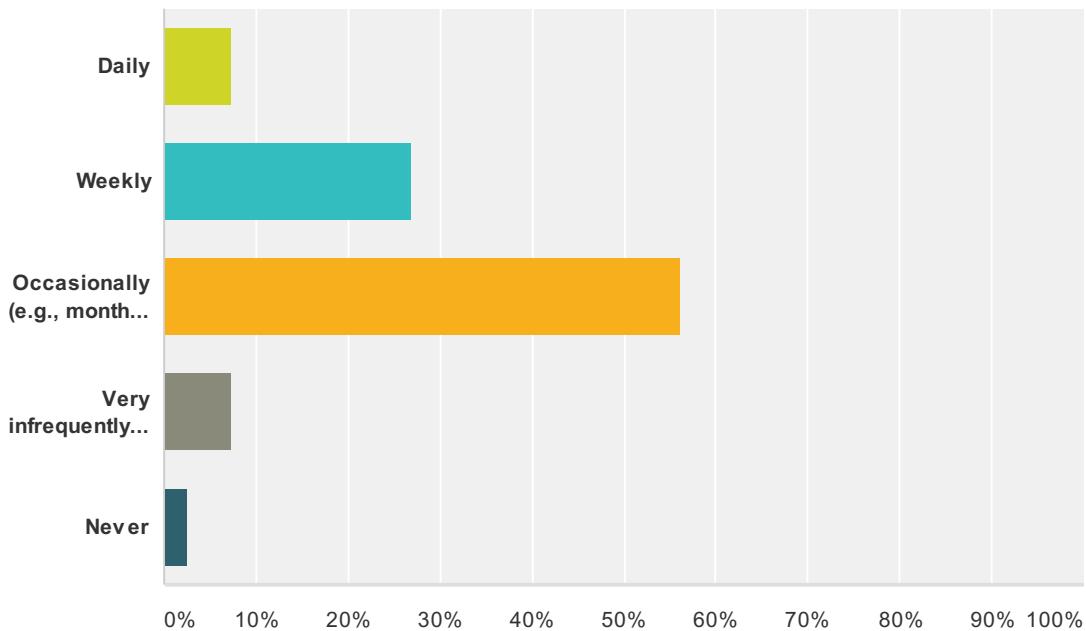
Answered: 40 Skipped: 1



Answer Choices	Responses	
Yes	100.00%	40
No	0.00%	0
Total		40

**Q5 How often do you find yourself referring back to/using what you learned in the class?**

Answered: 41 Skipped: 0



Answer Choices	Responses	Total
Daily	7.32%	3
Weekly	26.83%	11
Occasionally (e.g., monthly or every other month)	56.10%	23
Very infrequently (once or twice a year)	7.32%	3
Never	2.44%	1
<b>Total</b>		<b>41</b>

# Results Boot Camp Follow-up Survey

## Q6 Can you give us an example or two of something new you've considered or implemented as a result of attending Results Boot Camp?

Answered: 33 Skipped: 8

#	Responses	Date
1	I pulled together a community planning committee, went through the planning process with them in two meetings a month apart, wrote a 3 year strategic plan, wrote objectives for the first year, and obtained Library Board approval. I am now working with staff to develop a work plan for implementation that starts in July.	6/10/2014 5:03 PM
2	Doing away with in-house book discussion groups that only attract a small audience but require a tremendous amount of staff time.	6/7/2014 1:02 PM
3	Emphasizing data and usage over tradition and sentiment in decision-making	6/4/2014 2:26 PM
4	using surveys to assess impact	6/3/2014 4:52 PM
5	Customer service surveys; more social media; sharing ideas with librarians i met.	6/3/2014 3:41 PM
6	I was able to get rid of some sacred cows and move some hard to move staff from ruts that took a lot of their time and our money. I also changed the way I did some things (easy example - displays), so that they took very little time. I have also prodded and encouraged my director to think about getting Sandra for our next strategic plan, and WE GOT HER! Yeah! Everyone is SO excited about this process.	6/2/2014 4:03 PM
7	I got rid of all of the materials that were on obsolete formats (VHS children's movies-playaways). I am more open to change and delegating to staff members with expertise.	6/2/2014 2:26 PM
8	We have sought to weed out those things that we have always done the same way because we have always done it that way. It feels great to find new solutions to problems.	6/2/2014 1:50 PM
9	We completely adopted the Strategic Plan model at my library. This has also resulted in changing our evaluation process and caused the library to restructure.	6/2/2014 10:54 AM
10	Strategic Plan 2011-2015, Monthly Data reporting on Objectives, Annual review of activities, ongoing work on organizational competencies	6/2/2014 9:26 AM
11	A couple of points of view were helpful—in a very practical way, the discussion of the value to place on how many different people attend/are impacted by programming was really helpful. I've used that line of thought many times when staff suggest a new program where basically the same 15 people attend a weekly session. I think that the "sacred cow" sessions, though I wish there was a different name for them, were good. They led me to think about what barriers to improvement we have in place that we don't even see because we all assume that they can't be changed.	6/2/2014 8:57 AM
12	I have not been in a position to engage in long-range planning, but have used many of the techniques and comments I received that week. However, I am now in a position to use the long-range planning material, so it will be central to what I do in the next few years.	6/1/2014 8:41 PM
13	I'm always looking to see if the new projects or programs we offer follow the mission, long range plan, etc for our customers.	6/1/2014 12:35 PM
14	One of the biggest changes in my thinking is how to use resources and where to use limited funding for the best outcome. Also I am just beginning the process of working on our new strategic plan using The methods learned in boot camp.	6/1/2014 7:36 AM
15	As a library consultant within a regional library consortium, I have employed my learning - plus workforms - on implementing a strategic plan (e.g. making decisions on which activities to add, drop, continue) with a few of our member public libraries.	5/30/2014 4:43 PM
16	I was less afraid of "rocking the boat" to make changes.	5/30/2014 2:24 PM

## Results Boot Camp Follow-up Survey

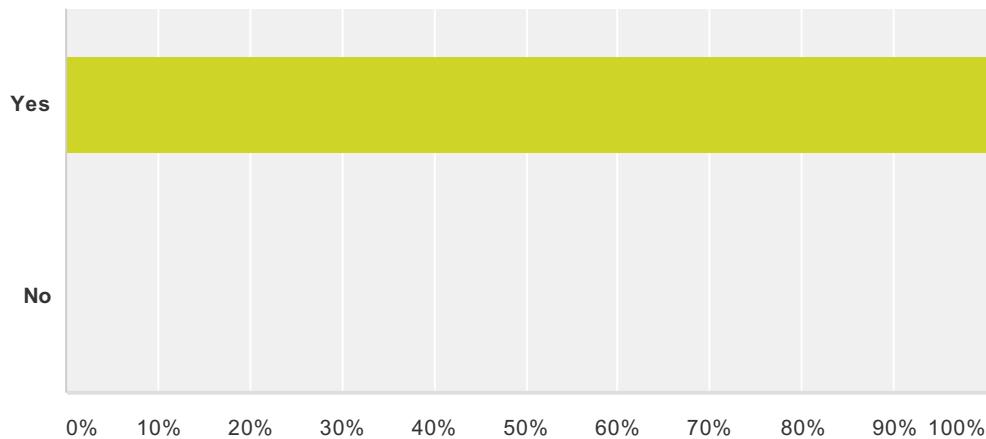
17	I don't remember what the title of the section was (and don't have my binder handy) but in Boot Camp we had an exercise where we first brain stormed some great ideas of things we could do but were not currently doing. Then we listed out all the the tasks we currently do and were given the instruction that we could not add anything without out finding something to give up. In Boot Camp it was on a much grander scale because it was conceptual and we could dream big, but I have used the same process with small practices as well. I have found that by completing this exercise with staff they see more clearly that we can't just keep adding without evaluating what we're currently doing. One of my libraries had so many steps to the item check-in process that it seriously delayed getting the item to the shelf after check-in, sometimes by days! Together we laid out all the steps in the current process and the amount of time needed to complete each step and then added up all that time so they could see the total amount of time spent between check-in to shelved. This evaluation method helped make them understand more clearly how convoluted this check-in process had become over the years. In the end when we came to the decision to "let go" of something it made the letting go much easier for them. and I believe it makes the new practice, process or program that much more successful because they have bought into the change. That's what it's all about in the end, getting staff buy-in so that progress can be made.	5/30/2014 12:59 PM
18	Because of Boot Camp, I look at libraries in a new way. I realize that a library has to remain flexible and responsive to the needs of its community. We have to be willing to change to keep pace with current needs.	5/30/2014 12:01 PM
19	I am attuned to writing measureable goals and strategies	5/30/2014 11:42 AM
20	The first major change I made at my library was splitting up the adult non-fiction collection and grouping/moving similar topics together. Now I am researching the possibility of going Dewey-less in this library. In a small special collection that was being moved to a new location, I requested and was granted the authority to merge the circulating and reference materials together into one stand-alone collection. Some materials remain as reference but patrons have better access to what we have all at once and staff has the authority to allow most of the reference materials to circulate as needed.	5/30/2014 11:39 AM
21	We were inspired to embark on a new (community driven) strategic plan with clear and measurable patron- based outcomes. We had been trying (with not huge success) to be everything to everyone and staff was burning out. As a result of defining our goals, we are more targeted and focused in our programming, our partnerships, our collections and our services. Staff is happier that they have a road map to "success" and a lens to view/evaluate new ideas and opportunities.	5/30/2014 10:56 AM
22	Bringing the community in to help assess what we need to do at the library. Better long range planning.	5/30/2014 10:38 AM
23	base your stategic plan on what the community is asign for. Gather input from the community by not talkign about the library but instead focused on gettign to know them and their needs, then seeing where the library fits and can make a difference. Calculating ROI.	5/30/2014 10:32 AM
24	Community partnerships; basing library services and programs on community needs	5/30/2014 10:30 AM
25	I try to frame all of my decisions around the library's strategic plan and I am much more focused on evaluating outcomes of projects.	5/30/2014 9:48 AM
26	The boot camp completely changed the way we do programming at all age levels. While we had been toying around with many of the ideas/changes that we wanted to make, the boot camp gave us a clear rationale and really a true need to make our changes.	5/30/2014 9:43 AM
27	implemented borrowing of cake pans re-evaluated and eliminated several Book Discussion Groups	5/30/2014 9:35 AM
28	It's an excellent program and I found the Boot Camp invaluable. I could have implemented the recommended strategies in a heartbeat. My Director is fearful of reaching out into the community. He wanted to handpick a committee to rubber-stamp his own "feelings" about "his clients" and the future of the library. His choices and decisions are unrelated to any data we are able to collect/analyze or the expressed preferences of our membership. This is hugely frustrating for me. The Board of Trustees has put their faith in the Director. My hands are tied, but it is a fabulous program.	5/30/2014 9:28 AM
29	We have greatly weeded our collection to materials that are in demand, and are in the process of making the space more usable by library visitors	5/30/2014 9:25 AM
30	The way I think about programming and outreach has changed; it's important to reach people in the community and not do something just because it interests someone on staff or repeat things that aren't successful.	5/30/2014 9:17 AM

## Results Boot Camp Follow-up Survey

31	I have focused on eliminating activities or tasks that are unnecessary. We have also started a major weeding/collection evaluation project which takes into account our ever-changing role as a library and how to only provide what is actually used and in the most effective way.	5/30/2014 9:05 AM
32	If you're spending energy on an initiative used by less than 5% of your users, stop doing it.	5/30/2014 8:11 AM
33	We changed the entire workflow of our library once we returned from bootcamp. We got rid of many sacred cows and are now much more efficient with our staff and our time management.	5/30/2014 8:04 AM

## Q7 Would you recommend (or have you already recommended) applying to Results Boot Camp to a colleague?

Answered: 37 Skipped: 4

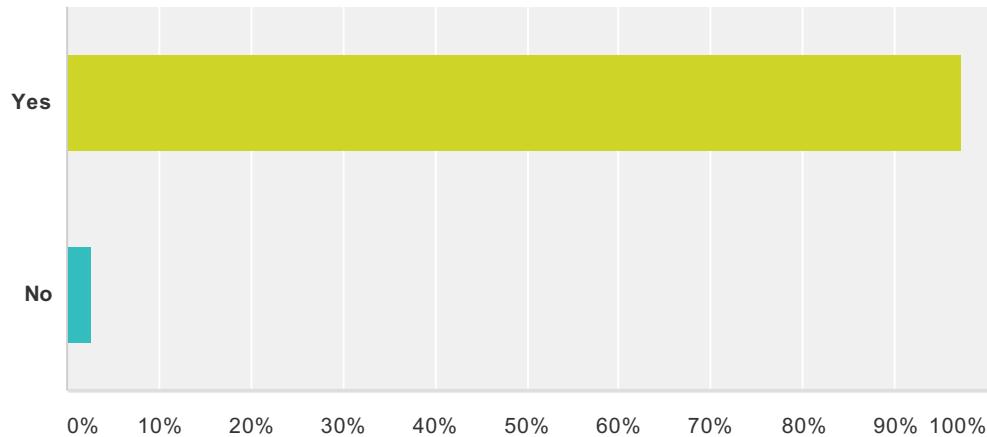


Answer Choices	Responses	
Yes	100.00%	37
No	0.00%	0
Total		37

## Results Boot Camp Follow-up Survey

### Q8 If available, would you attend another continuing education program similar to Results Boot Camp?

Answered: 36 Skipped: 5



Answer Choices	Responses	
Yes	97.22%	35
No	2.78%	1
Total		36

# Results Boot Camp Follow-up Survey

## Q9 What other professional development issues would benefit from this type of intensive training?

Answered: 23 Skipped: 18

#	Responses	Date
1	Leading staff through change, implementing new service priorities, letting go of old methods	6/10/2014 5:03 PM
2	This was a good overview. Many of the topics (innovation, change management, etc) could easily be explored in more detail	6/7/2014 1:02 PM
3	New forms of intensive community engagement and new ways that public library can remain relevant and useful in the civic, commercial, and academic landscape	6/4/2014 2:26 PM
4	Training supervisors. Learning to manage when you've never been a manager but are one now!	6/2/2014 4:03 PM
5	Personnel Management-Motivating staff to be responsible, creative, and decrease amount of unscheduled leave. Also interested in ways to increase circulation.	6/2/2014 2:26 PM
6	Strategic Planning, Dealing with Boards	6/2/2014 1:50 PM
7	Organizational Health training	6/2/2014 10:54 AM
8	Marketing and Strategic Communication; Hiring/Personnel Issues/Perfomance Review/Staff development	6/2/2014 9:26 AM
9	Perhaps to be a better manager.	6/1/2014 8:41 PM
10	Human Resources or staff management	6/1/2014 12:35 PM
11	Advocacy, marketing your library and it's programs, management issues	6/1/2014 7:36 AM
12	Developing new collection models, such as floating; developing a better library programming model; and changing how we "talk" about what we do.	5/30/2014 12:59 PM
13	Unsure	5/30/2014 12:01 PM
14	I can't think of any other. The other area I work is budgeting and perhaps that would be a issue for training	5/30/2014 11:42 AM
15	Any new ideas on adapting and being open-minded about new trends that make libraries accessible and viable in communities.	5/30/2014 11:39 AM
16	Staffing issues	5/30/2014 10:56 AM
17	Maybe time management issues.	5/30/2014 10:38 AM
18	project management, creative thinking and innovation	5/30/2014 10:32 AM
19	personnel management	5/30/2014 10:30 AM
20	Getting into management, especially for those with no library management experience; Innovative Marketing (and truly innovative, not a rehashing of old trends!)	5/30/2014 9:43 AM
21	Project Management oriented specifically to libraries.	5/30/2014 9:28 AM
22	management crash courses, also focusing on risk-taking and rewards	5/30/2014 9:25 AM
23	mentoring/coaching	5/30/2014 9:20 AM

# Results Boot Camp Follow-up Survey

## Q10 Any other questions or comments?

Answered: 15 Skipped: 26

#	Responses	Date
1	I enjoyed the 2013 Boot Camp and felt it was a good investment of my (and my library's) time and money. The only thing I would recommend is that the schedule be adjusted so that attendees have a mid-week break, maybe only a half-day of the workshop midway through. This would allow participants a little time to enjoy some sightseeing, rest, catch up on their own tasks if necessary, and to also get some temporary distance from the subject matter (for reflection, thought, maybe a homework assignment), and return refreshed for the remainder of the week.	6/4/2014 2:30 PM
2	I loved the Boot Camp and appreciated the expertise and great team of Sandra and June.	6/2/2014 4:04 PM
3	The Boot Camp was just what I needed at the time a needed it!	6/2/2014 2:27 PM
4	The Director and I attended. The Implementation of the strategic plan has had a major impact on how we do business at the library and helped us respond more readily to the needs of the community. It gave us accountability standards that we have used internally and externally and we have used the Strategic plan data collection on numerous grants.	6/2/2014 9:28 AM
5	I found that "Strategic Planning for Results" is too complex a model for what we need here. We run on an administrative shoestring, and it all became too cumbersome. I do, however, believe that the basic ideas behind it are spot-on. I would LOVE to see a similar model, with similar training, that would be a little more basic and simple. What I appreciated in the training was the basic idea that you need to know where you going, how to get there, and how to get barriers out of the way.	6/2/2014 8:59 AM
6	One thing I did not like that week was the unspoken (and sometimes spoken) assumption that all librarians are liberals. Political liberals may be in the majority in library leadership, but they need to learn that their personally and professionally held views do not always represent the library or general population mainstream.	6/1/2014 8:43 PM
7	I thought Boot Camp was excellent. I learned many new methods to improve services and feel confident that I can lead our team in formulating our new strategic plan which we plan to complete by the end of the year and begin implementing in January 2015	6/1/2014 7:38 AM
8	It was an excellent training. Even where I don't use specific tasks taught in Boot Camp the training has made me think differently about what we're doing, how we're doing it and how to do it better.	5/30/2014 12:59 PM
9	It was wonderful to network for a week from library employees from all around the country. That in itself was a truly valuable experience.	5/30/2014 12:02 PM
10	The time at Boot Camp was very valuable to get specific ideas from other attendees that could be applied to the changes we made. Every library has its own scenario but the shared information was extremely helpful in moving things forward at my library. Another colleague is planning to attend this year and she shares my interest in going Dewey-less. I've encouraged her to explore and discuss this topic with other attendees.	5/30/2014 11:53 AM
11	This is the best library training program I have ever attended!	5/30/2014 10:57 AM
12	About question #8. If I were not retiring very soon, I would take another course or the same course over.	5/30/2014 10:39 AM
13	Boot Camp showed me the importance of continuing to learn. I frequently participate in webinars and attend annual library conferences. Learning through collaboration with other librarians helps me grow and give better service to my library and community.	5/30/2014 10:33 AM
14	I loved this class. Only draw back was that unless your senior management team is on board some of the ideas face a road block from implementation. I think the class would be beneficial for senior management to attend along with management.	5/30/2014 10:33 AM
15	I found this to be one of the most day-to-day applicable library management classes that I have recently attended.	5/30/2014 9:50 AM



June 10, 2014

To: PLA Board of Directors  
Fr: Barbara Macikas, Executive Director  
Re: Financial Report, Fiscal Year 2014 as of April 2014

Revenues

Overall PLA revenues are 4% over budget (actual \$3,802,643 vs. budget \$3,657,093). Dues are 13% over budget and PLA conference is also 13% over budget. This is offset by lower than budgeted webinar registration, publications, donations and advertising. Between May and August, PLA will need to bring in \$340,000 in revenue to make revenue target. Preconference and PLA Boot Camp revenue will not be posted till later in the summer but given that conference registration is in, we may be challenged to meet budget on the revenue side.

Expenses

Expenses (actual \$2,578,623) are 10% under budget (budget \$2,882,883). This includes overhead of \$743,523 (vs. budget of \$690,980). There are salary/benefit savings due to grant funds offsetting a portion of PLA salary costs. In FY14, PLA is managing two IMLS grants and one Gates Foundation grant. Additionally, not all PLA conference bills have been posted. Expenses will even out by the close of FY14 when all conference bills are finalized and grant funding ends.

Please see document 2014.85 for revenues and expenses broken down by project.



**Public Library Association  
 FY 2013-14 Financial Report  
 Year-To-Date Report by Project**

	FY2013 <u>Budget</u>	FY2013 <u>Final Close Actual</u>	FY 2014 <u>Budget as of Apr.</u>	FY2014 <u>Actual as of Apr.</u>
<b><u>1 Administration (0000)</u></b>				
Revenue	\$0.00	\$0.00	\$0.00	\$0.00
Expenses	\$885,654.00	\$605,144.00	\$590,374.00	\$448,518.00
<b><u>2 Service to Members (3000)</u></b>				
Revenue	\$0.00	\$0.00	\$0.00	\$0.00
Dues	\$370,175.00	\$457,868.00	\$293,648.00	\$332,496.00
Expenses	\$189,990.00	\$33,769.00	\$115,008.00	\$35,754.00
<b>Net</b>	<b>\$180,185.00</b>	<b>\$424,099.00</b>	<b>\$178,640.00</b>	<b>\$296,742.00</b>
<b><u>3 Regional CE, Bootcamp (3007) August 2013</u></b>				
<b>Revenue</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
Registration	\$0.00	\$58,755.00	\$34,954.00	\$0.00
Expenses	\$0.00	\$39,945.00	\$24,572.00	\$212.00
OH & Tax	\$0.00	\$14,983.00	\$8,460.00	\$0.00
<b>Net</b>	<b>\$0.00</b>	<b>\$3,827.00</b>	<b>\$1,922.00</b>	<b>-\$212.00</b>
<b><u>4 PLA Partners (3020)</u></b>				
Revenue	\$69,000.00	\$23,310.00	\$69,660.00	\$87,975.00
Expenses	\$10,350.00	\$11,861.00	\$12,236.00	\$16,569.00
<b>Net</b>	<b>\$58,650.00</b>	<b>\$10,449.00</b>	<b>\$57,424.00</b>	<b>\$71,406.00</b>
<b><u>5 Public Libraries (3030)</u></b>				
Revenue	\$87,459.00	\$82,662.00	\$60,884.00	\$56,158.00
Expenses	\$148,422.00	\$127,902.00	\$86,730.00	\$52,011.00
OH	\$5,081.00	\$5,217.00	\$3,368.00	\$3,210.00
Tax	\$547.00	\$0.00	\$368.00	\$368.00
<b>Net</b>	<b>-\$66,591.00</b>	<b>-\$50,457.00</b>	<b>-\$29,582.00</b>	<b>\$569.00</b>
<b><u>6 ALA Conf Preconferences and MW Institute (3026)</u></b>				
Revenue	\$23,300.00	\$10,855.00	\$7,402.00	\$0.00
Expenses	\$17,481.00	\$1,511.00	\$5,568.00	\$0.00
OH	\$5,942.00	\$2,768.00	\$1,792.00	\$0.00
<b>Net</b>	<b>-\$123.00</b>	<b>\$6,576.00</b>	<b>\$42.00</b>	<b>\$0.00</b>

	<u>Budget</u>	<u>FY2013</u> <u>Final Close Actual</u>	<u>FY 2014</u> <u>Budget as of Apr.</u>	<u>FY2014</u> <u>Actual as of Apr.</u>
<b><u>7 Web Based CE (3040)</u></b>				
Revenue	\$72,000.00	\$66,934.00	\$59,994.00	\$49,905.00
Expenses	\$23,075.00	\$18,774.00	\$14,134.00	\$15,636.00
OH	\$9,180.00	\$8,534.00	\$7,258.00	\$6,039.00
<b>Net</b>	<b>\$39,745.00</b>	<b>\$39,626.00</b>	<b>\$38,602.00</b>	<b>\$28,230.00</b>
<b><u>8 Publications (3058)</u></b>				
Revenue	\$54,134.00	\$25,468.00	\$25,264.00	\$8,921.00
Expenses	\$44,378.00	\$9,746.00	\$23,028.00	\$6,410.00
OH & Taxes	\$6,204.00	\$3,008.00	\$2,170.00	\$661.00
<b>Net</b>	<b>\$3,552.00</b>	<b>\$12,714.00</b>	<b>\$66.00</b>	<b>\$1,850.00</b>
<b><u>9 NC 2014 General Program (3061)</u></b>				
Revenues		\$1,163,955.00		\$1,296,851.00
Expenses		\$212,368.00		\$372,014.00
OH & Taxes		\$281,677.00		\$313,838.00
<b>Net</b>		<b>\$669,910.00</b>		<b>\$610,999.00</b>
<b><u>10 NC 2014 Exhibits (3062)</u></b>				
Revenues		\$1,520,896.00		\$1,604,320.00
Expenses		\$521,156.00		\$284,164.00
OH & Taxes		\$336,380.00		\$388,246.00
<b>Net</b>		<b>\$663,360.00</b>		<b>\$931,910.00</b>
<b><u>11 NC 2014 Promotion (3063)</u></b>				
Revenues		\$107,000.00		\$63,579.00
Expenses		\$69,700.00		\$37,664.00
OH & Taxes		\$12,947.00		\$7,693.00
<b>Net</b>		<b>\$24,353.00</b>		<b>\$18,222.00</b>
<b><u>12 NC 2014 Phil Reg (3064)</u></b>				
Revenues		\$0.00		\$0.00
Expenses		\$30,252.00		\$14,830.00
OH		\$0.00		\$0.00
<b>Net</b>		<b>-\$30,252.00</b>		<b>-\$14,830.00</b>

	FY2013 <u>Budget</u>	FY2013 <u>Final Close Actual</u>	FY 2014 <u>Budget as of Apr.</u>	FY2014 <u>Actual as of Apr.</u>
<b><u>13 NC 2014 Opening/Closing Session (3065)</u></b>				
Revenues		\$0.00		\$0.00
Expenses		\$162,000.00		\$166,326.00
<b>Net</b>		-\$162,000.00		-\$166,326.00
<b><u>14 NC 2014 Programs (3066)</u></b>				
Revenues		\$0.00		\$0.00
Expenses		\$61,280.00		\$77,430.00
<b>Net</b>		-\$61,280.00		-\$77,430.00
<b><u>15 NC 2014 Meal Events (3069)</u></b>				
Revenues		\$83,250.00		\$105,435.00
Expenses		\$78,272.00		\$152,451.00
OH		\$0.00		\$0.00
<b>Net</b>		\$4,978.00		-\$47,016.00
<b><u>16 NC 2014 Preconference(3070)</u></b>				
Revenues		\$108,500.00		\$107,180.00
Expenses		\$42,856.00		\$47,313.00
OH & Taxes		\$26,257.00		\$12,969.00
<b>Net</b>		\$39,387.00		\$46,898.00
<b><u>17 Preschool Literacy (3120)</u></b>				
Revenue	\$24,000.00	\$76,216.00	\$26,664.00	\$30,950.00
Expenses	\$15,930.00	\$19,245.00	\$34,692.00	\$3,791.00
OH & Taxes	\$3,060.00	\$9,718.00	\$3,226.00	\$3,745.00
<b>Net</b>	\$5,010.00	\$47,253.00	-\$11,254.00	\$23,414.00
<b><u>18 PLA 2016 Promotion and Planning (3145)</u></b>				
Revenue	\$0.00	-\$100.00	\$0.00	\$0.00
Expenses	\$67,500.00	\$82,051.00	\$5,336.00	\$50,731.00

Due to coding error, FY14 actual includes \$38K to be re-allocated to 3061 and 3061.

	FY2013 <u>Budget</u>	FY2013 <u>Final Close Actual</u>	FY 2014 <u>Budget as of Mar</u>	FY2014 <u>Actual as of Apr.</u>
<b>19 Public Library Data Service (3172)</b>				
Revenue	\$88,000.00	\$28,072.00	\$16,532.00	\$6,892.00
Expenses	\$74,325.00	\$52,096.00	\$40,164.00	-\$5,115.00
OH & Taxes	\$11,220.00	\$3,579.00	\$2,000.00	\$834.00
<b>Net</b>	<b>\$2,455.00</b>	<b>-\$27,603.00</b>	<b>-\$25,632.00</b>	<b>\$11,173.00</b>
Contains U of I refund				
<b>20 PLA Virtual Conference (3173)</b>				
Revenue			\$31,994.00	\$51,980.00
Expenses			\$26,640.00	\$29,970.00
OH & Taxes			\$3,872.00	\$6,290.00
<b>Net</b>			<b>\$1,482.00</b>	<b>\$15,720.00</b>
<b>22 Certified Public Library Administrator (CPLA) (3189)</b>				
Revenue	\$13,000.00	\$6,700.00	\$6,500.00	\$0.00
Expenses	\$9,708.00	\$5,182.00	\$4,855.00	\$0.00
OH & Taxes	\$3,315.00	\$1,709.00	\$1,573.00	\$0.00
<b>Net</b>	<b>-\$23.00</b>	<b>-\$191.00</b>	<b>\$72.00</b>	<b>\$0.00</b>
<b>23 Leadership Initiative (3174) * end. interest</b>				
Revenue	\$0.00	\$0.00	\$0.00	\$16,480.00
Expenses	\$0.00	\$3,871.00	\$0.00	\$22,780.00
OH & Taxes	\$0.00	\$0.00	\$0.00	\$0.00
<b>Net</b>	<b>\$0.00</b>	<b>-\$3,871.00</b>	<b>\$0.00</b>	<b>-\$22,780.00</b>
Contains some expenses for the Performance Measurement Task Force				
<b>24 Leadership Academy (3196)</b>				
Revenue	\$0.00	\$0.00	\$0.00	\$0.00
Expenses	\$17,080.00	\$45,174.00	\$0.00	\$0.00
OH & Taxes			\$0.00	\$0.00
<b>Net</b>	<b>-\$17,080.00</b>	<b>-\$45,174.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>25 Cost Share IMLS Grant Digital Learn (3188)</b>				
Revenue	\$0.00	\$0.00	\$39,996.00	\$0.00
Expenses	\$0.00	\$42,425.00	\$30,314.00	\$2,368.00
OH & Taxes			0	\$0.00
<b>Net</b>	<b>\$0.00</b>	<b>-\$42,425.00</b>	<b>\$9,682.00</b>	<b>-\$2,368.00</b>
<b>26 Cost Share IMLS Grant NDSR (3198)</b>				
Revenue	\$0.00	\$0.00	Grant ended	
Expenses	\$5,000.00	\$1,549.00		
OH & Taxes				
<b>Net</b>	<b>-\$5,000.00</b>	<b>-\$1,549.00</b>		

**BALANCE SHEET STATEMENT**

	FY2013	FY2013	FY 2014	FY2014
	<u>Budget</u>	<u>Final Close Actual</u>	<u>Budget as of Apr.</u>	<u>Actual as of Apr.</u>
<b>Opening Fund Balance</b>	\$2,129,045.00	\$2,129,045.00	\$1,769,722.00	\$1,769,722.00
<b>Revenue</b>	\$867,428.00	\$868,334.00	\$3,657,093.00	\$3,802,643.00
<b>Expenses</b>	\$1,511,626.00	\$1,172,353.00	\$2,191,535.00	\$1,834,732.00
<b>Overhead</b>	\$52,463.00	\$55,304.00	\$690,980.00	\$743,523.00
<b>Taxes</b>	\$547.00	\$0.00	\$368.00	\$368.00
<b>Net</b>	-\$697,208.00	-\$359,323.00	\$774,210.00	\$1,224,020.00
<b>Transfer to Endowment</b>	\$0.00	\$0.00	\$0.00	\$0.00
<b>Closing Fund Balance</b>	\$1,431,837.00	\$1,769,722.00	\$2,543,932.00	\$2,993,742.00
<b>LTI Principle</b>		\$1,134,221.00		\$ 1,134,221.00
<b>LTI Interest</b>		\$36,912.00		\$32,521.00
<b>Expenses</b>		\$9,515.00		\$5,992.00
<b>Net</b>		\$27,397*		\$26,529.00

\*Rolled into PLA operating budget; not LTI. Est. as LTI not closed



**TO:** PLA Board of Directors

**RE:** Adoption of the 2015 Fiscal Year Budget

**ACTION REQUESTED/INFORMATION/DISCUSSION/REPORT**

ACTION

**ACTION REQUESTED BY:**

Clara Bohrer, Budget & Finance Committee Chair

**DRAFT OF MOTION:**

That the PLA Board of Directors approve the FY 2015 budget as presented.

**BACKGROUND:**

Attached is the summary overview of the 2015 fiscal year budget as well as an overview of the budget broken down by project and narrative describing variances in the budget from the previous non-conference year. The PLA Budget & Finance Committee recommends that the PLA Board of Directors adopt the FY2015 Budget.

## FY2015 Projected Operating Fund Balance Summary

### 2014 Projected Fund Balance:

2013 Beginning Fund Balance	\$2,129,045
2013 Revenue (actual)	+ 868,334
<i>Subtotal</i>	<hr/>
2013 Expense (actual)	- 1,227,657
2014 Opening Fund Balance	\$ 1,769,722

### 2014 Estimated Budgetary Ceiling:

2014 Opening Fund Balance	\$1,769,722
2014 Revenue Budgeted	+ 3,997,194
<i>Subtotal</i>	<hr/>
2014 Expenses Budgeted	- 3,491,254
2014 Estimated Budgetary Ceiling	\$ 2,275,662
Budgeted Transfer to Endowment 2014	<hr/>
<i>2014 Projected Ending Fund Balance</i>	\$ 2,275,662

### 2015 Projected Fund Balance:

2014 Estimated Budgetary Ceiling	\$2,275,662
2015 Revenue Budgeted	+ 859,052
<i>Subtotal</i>	<hr/>
2015 Expenses Budgeted	- 1,714,695
<i>2015 Projected Year End Fund Balance</i>	\$ 1,420,019

Note: For financial planning purposes, ALA uses the budget submitted for the previous fiscal year to project the year-end fund balance for the 2015 fiscal year that is in development. Actual revenues and expense are noted as of the most current performance report available at this writing, which is April 2014.

**PLA FY2015 Budget by Project**

<b>Project</b>	<b>Revenue</b>	<b>Expenses</b>	<b>Net</b>
0000 Administration	\$0	\$934,452	-\$934,452
3000 Service to Members	\$457,520	\$209,740	\$247,780
3007 Regional CE	\$52,437	\$50,181	\$2,256
3011 Spring Symposium-Event	\$25,000	\$26,204	-\$1,204
3020 Partners	\$54,500	\$15,950	\$38,550
3026 AC Preconference	\$11,105	\$11,177	-\$72
3030 Public Libraries Magazine	\$84,750	\$134,437	-\$49,687
3040 Web Based CE	\$70,000	\$28,685	\$41,315
3058 Publications	\$25,420	\$15,812	\$9,608
3120 Preschool Lit (ECRR)	\$40,000	\$21,567	\$18,433
3172 PLDS	\$1,120	\$35,492	-\$34,372
3189 Certified Pub Lib Admin.	\$13,000	\$7,468	\$5,532
3174 Leadership Initiative cost share	\$0	\$38,831	-\$38,831
3145 PLA 2016 Planning	\$0	\$141,200	-\$141,200
3188 digital learn.org	\$30,000	\$45,487	-\$15,487
<b>TOTAL</b>	<b>\$859,052</b>	<b>\$1,714,695</b>	<b>-\$855,643</b>

## ***Long Term Investment and Interest***

FY14 Beginning LTI Balance \$1,134,261

Revenues (as of 4/2014)

Interest \$ 32,521  
Total Revenues \$ 32,521

Expenses (as of 4/2014)

Bank Service/Admin Fees \$ 5,992  
Total Expenses \$ 5,992

Net Revenue (expense) as of 4/2014 \$ 26,529

FY14 Transfer to endowment \$ 0

Projected amount of net dividends that can be transferred to Board-designated project:  
\$35,000. Final amount will be calculated at close of fiscal year in September.

## ***PLA FY2015 – Comparison to previous non-conference year budget***

Here is an overview of the draft Fiscal Year 2015 budget, along with comparison data for actual and budget in previous and current years.

	FY12 Actual	FY13 Actual	FY14 Budget	FY15 Draft
<b>Beginning Fund Balance</b>	\$1,049,598	\$2,129,598	\$1,769,722	\$2,275,662
<b>Revenues</b>	\$4,243,107	\$ 868,334	\$3,997,194	\$ 859,052
<b>Expenses</b>	\$2,363,924	\$1,172,344	\$2,782,625	\$1,614,388
<b>Overhead</b>	\$ 799,655	\$ 55,304	\$ 708,629	\$ 48,707
<b>Total Expenses</b>	\$3,163,579	\$1,227,648	\$3,491,254	\$1,714,695
<b>Net</b>	\$ 1,079,528	\$ (359,314)	\$ 505,940	\$ (855,643)
<b>Ending Fund Balance</b>	\$ 2,129,052	\$1,769,722	\$2,275,662	\$1,420,019

## ***PLA FY2015 – Narrative Overview***

### Revenues

The revenue side of the FY 2015 budget is flat. Revenues for dues, webinars, publications and sponsorships are budgeted at actual FY13 levels.

- The largest source of PLA revenue in a non-conference year is membership dues. They are 53% (\$457,520) of the FY15 budget. Membership typically declines in a non-conference year. FY 15 is the final year of the incremental \$5/year dues increase. In FY16, dues will increase based on the annual average increase in the CPI.
- PLA will continue to seek new revenue opportunities related to new products to support the Every Child Ready to Read product.
- As the performance measurement work continues, PLA will begin to develop communications and products related to the roll out of the new measures for public libraries.
- PLA has budgeted for webinars but revenues are flat given the extremely competitive webinar market.

### Expenses

FY 15 budgeted expenses are \$487,047 over actual FY13 expenses. Increases in expenses are described below.

- Increased salary and benefits of approximately \$250,000 are included in the FY15 budget. One FT position has gone from grant funding to the PLA operations budget and the equivalent of 50% of a position which was funded by grants will move back to the PLA operations budget.
- Sustaining the DigitalLearn.org site will require tech support that was previously covered by the grant. Additional staff time will need to be allocated to sustain this work. IMLS has signaled an interest in receiving a new proposal to build on the DigitalLearn site but we need to budget to support it as current grant ends August 2014. We are also looking for sponsorships from technology providers and literacy foundations for this project.
- There is a \$40,000 deposit on the Denver convention center. A deposit wasn't required in FY13; this is a timing issue.
- We have also added to the promotion budget line from FY13 (approximately \$20,000 from FY13). This is mostly a timing issue for expenses that previously were in the next budget year. This will allow us to begin promoting PLA 2016 sooner.
- There is \$100,000 budgeted for the PLA board's fund for strategic initiatives. Based on the strategic planning discussion with the Board and PLA member leaders, some or all of this may be allocated to developing public awareness/messaging related to the perception of public libraries from books/reading toward learning spaces.
- There is travel money budgeted for the Performance Measurement TF. This may not be needed if grant monies become available.

TO: PLA Board of Directors  
FROM: Christine Lind Hage, PLA Councilor  
Date: June 5, 2014  
RE: Report on Council discussions between Midwinter and Annual Conf.

Below is a summary of the hot topics that have appeared on the Council list since our Midwinter meeting.

**Planning and Budget Assembly (PBA)** – There were lengthy discussions on the value of continuing the PBA and its role vs. the role of the Budget Analysis & Review Committee (BARC). Councilmembers Karen Schneider and Aaron Dobbs put together a survey of past and present PBA members. The results were summarized on Connect. In essence people felt that basic financial information was repeated over and over and that no significant discussions took place at PBA. ALA's response to the survey can be found at <http://connect.ala.org/pba>. Karen Schneider summarized the comments by highlighting ALA's:

- Commitment to providing documents in advance
- Request that all PBA members attend the ALA Council/Executive Board/Membership Information Session (as a way to bone up on key info and reports), in order to...
- "free up time at the meeting for active planning and for discussion of mutually-agreed upon agenda items of interest to PBA members"
- Advising PBA in advance of priorities that should inform discussion; "would like to focus much of our energy at the Annual Conference on a discussion of the Strategic Initiatives and how they will shape our programs and budgets going forward", and
- An overall respectful tone toward PBA.

**Committee Reports** – The discussion focused on ALA committees, not divisions or division committees, although the instance that brought the issue forward related to a search for a set of division minutes. Big ALA has a plethora of committees that usually meet during conference. Some of the committee chairs report out after each conference to either the Council, Executive Board or on Connect. Some committees just don't report. The question was whether the committee met or didn't meet since there was no report to summarize discussion or actions.

The Committee on Organization (COO) developed a procedure for "review of silent committees" and in fact COO proposes retiring the Committee Information Update (CIU) form in favor of an expectation and requirement that every committee semiannually submit a report of its plan, activities, and accomplishments. Rather than a template such as the CIU, COO recommends

that each committee prepare a report in a form that most effectively conveys information that should be shared with and made available to elected leaders and members. Committee chairs would receive reminders along with offer what composition teachers call “writing prompts”—i.e., suggestions or topics that can stimulate ideas worth writing about. Prompts include:

- Accomplishments
- Planned activities
- Issues that affect the committee's work and their implications for the future
- Interactions with other units within ALA
- Relationship of the committee's work to the ALA strategic plan
- Current level of committee members' involvement (more substantive than an attendance roll)
- Committee self-check on its value and viability (update charge, discontinue committee, consolidate with another, change structure, other observations)
- Other issues of each committee's own devising

Committee reports to Council will continue to meet this reporting requirement. COO encourages committees to include a section in those reports that goes beyond action items brought to Council—a section that addresses issues, as appropriate, such as those in the bulleted list above.

The COO staff liaison will work with other committees' staff liaisons to assure that reports are submitted, are posted on each committee's web site, and are listed with links

[www.ala.org/aboutala/governance/council/cmte\\_info\\_report](http://www.ala.org/aboutala/governance/council/cmte_info_report). Staff will also investigate options for giving greater visibility to this collection of linked reports.

COO recommends that such reports be submitted and posted semi-annually. This does not preclude more frequent reports. Nor does this tie reports to the Midwinter Meeting and Annual Conference. This accommodates differences in workflows among the committees. COO recognizes that at least two committees—the Nominating Committee and the Election Committee—each have an annual deadline tied to the annual elections cycle. In the case of these committees, one of its two semi-annual reports might refer back or forward to its other report with the explanation that its work is carried out during a particular, recurrent part of each year.

**Screening of the movie *The Speaker* –**

The ALA Intellectual Freedom Committee and the Association of American Publishers will present a program on the controversial ALA-produced 1977 film "The Speaker ... A Film About Freedom" at the 2014 Annual Conference. In addition, there will be two screenings of the film prior to the program as part of the "Now Showing at ALA" film series. The program, "Speaking about 'The Speaker,'" is co-sponsored by the Black Caucus of the ALA and the Library History Round Table.

The film depicts a high school current events club that decides to invite a white supremacist professor from a local college to address the student body and the controversy that ensues. It was intended for schools, libraries and other organizations to encourage them to discuss the true meaning of the freedom of expression, particularly regarding "tolerance for ideas we detest." Many ALA members objected to the film's subject matter and the process by which the film was produced. After contentious debate at the 1977 Annual Conference, multiple ALA bodies voted down proposals to remove the organization's name from the film.

2014 program participants will include Robert Wedgeworth, who was ALA executive director during the controversy; Beverly Lynch, a professor at UCLA who includes "The Speaker" in her library school instruction; and Mark McCallon, a librarian at Abilene Christian University, whose scholarship focuses on "The Speaker" controversy. Freedom to Read Foundation president Julius C. Jefferson, Jr. will moderate the panel and subsequent audience discussion.

The debate has come alive again on the Council List. References have been made to the work of Eric Moon, E.J. Josey, Clara Stanton Jones and Major Owens. Opposition has come from both black and white members of the association, showing that the film is just as controversial today as it was back in 1977. The conversation continues.

**Draft Report on Council Electronic List and Council Documents** – The original Council List was founded in 1993 and the guidelines established at that time only addressed the listserv. As ALA has moved closer to a paperless workflow and interest has grown in our carbon footprint, there has been confusion regarding the posting and distribution of Council documents. A task force was formed to examine and review existing guidelines and electronic communications and to present a final report to Council at Midwinter 2015. An interim document has been floated for discussion at Annual 2014.

A current draft resolution would:

- Limit read/write access to current council members, ALA and Council Committee Chairs and authorized ALA staff
- Provide read only access to all members.
- Maintain the List as un-moderated.
- Use the List for official or informal communication.
- Have all Council documents posted to Council area of ALA Connect as public documents and will link the documents to the Council List.
- Would create a tracking system so members could identify specific versions of documents
- Have the Council Secretary (Lois Ann Gregory Wood) maintain the list and manage the posting of documents and reports which will be labeled draft, final, approved or adopted.

# ALA American Library Association

## America's Public Libraries in the FCC's E-rate Proceeding

### Positions of the American Library Association

June 2014

Advocacy on the E-rate program has been a major policy priority of the American Library Association (ALA) since the inception of the program in the late 1990s. Through a lead policy analyst for E-rate, an E-rate Task Force, expert consultants, outside legal counsel, and active participation in two leading coalitions relative to E-rate, ALA is engaged in the current proceeding on reshaping the E-rate program for the broadband era. Accordingly, ALA's strategy builds on this record and expertise from the past decade and a half.

#### **Reboot Not Recreate**

The E-rate program has been successful. It has been a critical factor in moving libraries beyond the dial-up era of the 1990s to the broadband era of the 21<sup>st</sup> century. Virtually all 16,415 public library buildings now have broadband Internet connectivity at some level.

ALA strongly agrees with the Federal Communications Commission (FCC) to focus the program on broadband connectivity. However, as the FCC recognizes, simple connectivity is not enough for the present, much less to fulfill future technological infrastructure needs that libraries require to advance *The E's of Libraries™* (Education, Employment, Entrepreneurship, Empowerment, and Engagement)—the central role of libraries in communities.

Thus the next phase of the E-rate program needs to focus not just on broadband connectivity per se, but on providing scalable broadband infrastructure to libraries that enables 1 Gbps and faster speeds. The scalability characteristic allows libraries to grow their broadband capacity commensurate with need, and the E-rate program must help ensure the affordability of this broadband growth. Of course, this focus must be pursued in concert with the existing policy of according preference to rural and poorer libraries and schools.

Finally, the ALA views K-12 schools as close partners in the E-rate program. Libraries seek new ways of collaborating with K-12 schools on E-rate and complementing schools' efforts to improve the E-rate program overall.

#### **Leverage the "Down Payment"**

The FCC has identified a one-time amount of \$2 billion from unused funds that will be used as a "down payment" on E-rate reform. Given the years of underfunding the E-rate program, there are many needs for the \$2 billion down payment. ALA proposes that a significant portion of these funds should be focused on investments in broadband networks that enable scalable broadband capacity for libraries (and schools) that have the poorest connectivity. These investments will provide direct benefit to the recipients and their technology users, but also provide insight on the most cost-effective ways to

upgrade to high-capacity broadband for schools and libraries across the country in the long run—thus serving as “2 for 1 investments.”

ALA identified three points of leverage—or more colloquially, ways to seize opportunities presented by grasping the “low-hanging fruit.” As ALA’s mission focuses on libraries, we advocate for these proposals for libraries. However, schools have analogous needs, and we are supportive of similar efforts targeted for schools—or to implement these concepts for schools and libraries together in integrated programs.

- 1) *Scalable Technologies Deployment Program.* Some libraries with poor broadband connectivity are in close proximity to broadband providers that can ensure scalable broadband at affordable initial construction charges and recurring costs after the deployment is complete. ALA recommends the establishment of a *Scalable Technologies Deployment Program* to encourage libraries to take advantage of such situations in which high-capacity broadband infrastructure is in sight, perhaps literally so.
- 2) *School-library Wide Area Network Partnerships.* Another proposal focuses on promoting collaboration between a library and nearby school. ALA urges the FCC to eliminate barriers and provide incentives for schools and libraries to deploy high-capacity broadband in cooperation, rather than in isolation. Currently, such collaborations are rare, but they are a natural partnership due to commonalities in their respective missions that may provide more cost-effective networking solutions.
- 3) *Network Diagnostics and Technical Support Program.* Some libraries, especially smaller libraries and others without dedicated information technology staff, need assistance to plan and orchestrate the implementation of high-capacity broadband. Thus, ALA proposes that some of the down payment be used to aid libraries in planning, purchasing, and implementing network infrastructure and internet access through state library agencies or in partnership with such agencies. In addition to the direct support provided to libraries, this *Network Diagnostics and Technical Support Program* is expected to yield improved aggregate processes such as improved network performance practices and bulk buying, developed through a grassroots (local/regional/state) approach.

Generally E-rate support for in-building networking (i.e., Priority 2) has been severely inadequate for years. ALA recommends that a large portion of the down payment should be directed to library and school P2 needs. Applicants that have not received P2 support in the past five years should receive preference for this funding opportunity.

### **Increase Library Participation and Benefit in the E-rate Program**

Looking beyond the use of the \$2 billion, the overall ongoing funding level of the program requires urgent attention so that all libraries and schools can obtain the high-capacity, affordable broadband capacity they need. For the current funding year, there is just enough funding to cover all Priority 1 (P1) needs (generally, telecommunications and internet services to, but not within, school and library buildings) with no support for P2 at all. Without a change in funding policy, the program

won't be able to cover all of P1 needs, much less any of P2 needs, as soon as the next funding year. ALA strongly supports an increase in the E-rate fund (raising the cap). *At a minimum*, adjusting the fund to account for inflation retroactive to the program's inception should be done—this would increase the fund by approximately \$1 billion per year. However, the documented needs far exceed this minimum increase.

Receipt of support from the E-rate program depends on institutions submitting applications. Yet we know that the complexity of the application process discourages some libraries from applying, or causes libraries to request less than the amount for which they are eligible. The FCC should effect various program changes that would enable more libraries to receive greater funding from the E-rate program.

The first class of recommendations focuses on process changes that would reduce the administrative costs of applying. These costs are not trivial, and especially so for smaller libraries who have less administrative capacity for applying, and whose applications request lower dollar amounts as compared to larger libraries.

- *Eliminate E-rate program procurement rules.* Libraries are already subject to procurement rules at the state and/or local level for all of their acquisitions. There is no need for an additional layer of procurement rules for purchases under the E-rate program.
- *Simplify application process for multiyear applications.* Create evergreen 471 forms and application process so that an applicant does not need to repeat the application process each year for multi-year contracts or projects.
- *Eliminate the technology plan requirement for Priority 2.* ALA supports technology planning but does not think it should be a program mandate enforced by the FCC. (In 2010 the FCC removed the need for technology plans for P1 applications but retained it for P2 applications.)
- *Enable applicants to receive E-rate funds directly.* Currently, E-rate payments are first sent to the service provider, which adds an additional layer of administration, complexity and delay in getting the funds to the library.
- *Eliminate discrimination against consortium applications.* Each application within a consortium application must be fully reviewed and approved before any applicant may receive approval; thus consortium applications are often last to be approved. A process change is needed to allow approved applications to proceed in a more timely fashion.
- *Expand outreach by the Universal Service Administrative Company (USAC), especially to rural areas.* Training is conducted in major cities across the country. Increase the number of training sessions to include some smaller cities and/or use technology to provide training to remote locations. Identify other means to support applicants from smaller libraries. Provide a modest amount of funding to state library agencies to conduct E-rate training and outreach.

Other changes increase library benefits from participating in the E-rate program.

- *Increase data transparency.* Through increased access to data from USAC and heightened enforcement of the FCC's Lowest Corresponding Price rule, applicants will be in a better position to obtain more competitive pricing and terms.
- *Improve the discount metric.* Eligibility for the school lunch program is used to define the level of E-rate discount. But it is applied differently for schools and libraries. Modify the school methodology to match how library poverty is determined, or vice versa.
- *Facilitate fiber ownership by libraries when cost effective.* In some circumstances it is less expensive for libraries to own their own fiber when compared to ongoing costs charged by a commercial broadband provider.
- *Use library locale codes to determine rurality.* The Institute of Museum and Library Services developed library-specific geocoding for rural libraries. This classification is more accurate, and helps to ensure that libraries obtain the proper level of discounts.<sup>1</sup>

## Conclusion

ALA continues its analysis and discussions within the library community and beyond to identify additional recommendations for improvements in the E-rate program. The Association deeply appreciates the FCC's initiative and leadership in soliciting broad stakeholder input in this needed revamping of the E-rate program, and acknowledges the strong Democratic and Republican support for the program overall, not only at the FCC, but also in the U.S. Congress and Administration.

ALA advocates for the consideration of these proposals through engagement directly with FCC officials and in communications with the larger stakeholder community. ALA looks forward to continuing our work and partnering with other groups who share a common goal of ensuring a viable, robust E-rate program that can address the 21<sup>st</sup> century broadband and network needs of our libraries and schools.

## CONTACT FOR FURTHER INFORMATION

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Version of June 9, 2014

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<sup>1</sup> Readers are directed to ALA's submissions to the FCC for further details on all of ALA's proposals, available at <http://apps.fcc.gov/ecfs/>. Use "13-184" for the Proceeding Number and "American Library Association" as the Name of Filer.

**To:** PLA Board of Directors

**From:** Miguel Figueroa, director, ALA Center for the Future of Libraries  
[mfigueroa@ala.org](mailto:mfigueroa@ala.org) or 312-280-5851

**RE: ALA's Center for the Future of Libraries – An Overview**

The American Library Association announced the formation of a Center for the Future of Libraries on October 8, 2013.

The Center for the Future of Libraries will:

- Explore demographic, environmental, political, economic, cultural, societal and technological changes and their affect on the library world
- Share future trends and futures thinking through social media (#libraryofthefuture), programming, and reports
- Build connections with experts and innovative thinkers inside and outside of libraries
- Provide a forum for experts from all sectors to share ideas and explore joint solutions
- Promote futuring techniques to the library community

The Center will also collect and highlight futures-focused initiatives from ALA divisions, round tables, offices, and affiliates and ensure that these efforts receive broad attention.

A long-term goal for the Center might be the creation and coordination of new mechanisms for the exchange of innovative practices and an association-wide “incubator” for experimentation.

The primary audience for the Center’s work will be planners within the library and information science community. As library leaders engage their communities in this future-focused conversation, the Center will have secondary impact in the broader communities served by libraries.

The Center for the Future of Libraries is modeled on the successful American Alliance of Museums’ [Center for the Future of Museums](#) and supported by the Institute of Museum and Library Services (IMLS). The Center’s sustainability will come from budgeted ALA operating support, sales of products and services, and additional grant funding.

<b>Trend Areas - DEGEST</b>			
Demography	Government	Society & Culture	
Environment	Economics	Technology	

<b>Futuring Techniques</b>			
Brainstorming	Gaming	Scanning	Trend Monitoring
Change Management	Modeling	Scenarios	Trend Projection
Design Thinking	Polling	Trend Analysis	Visioning
Historical Analysis			



**TO:** PLA Board of Directors

**RE:** 2014-2015 Emerging Leader Projects

**ACTION REQUESTED/INFORMATION/DISCUSSION/REPORT**

Discussion

**ACTION REQUESTED BY:**

Carolyn Anthony, PLA President  
Barb Macikas, PLA Executive Director

**DRAFT OF MOTION:**

N/A.

**BACKGROUND:**

Attached is background related to the ALA Emerging Leaders program and PLA's participation in the program, as well as suggested PLA projects for the next EL cycle. We would appreciate the Board's thoughts related to selecting the most impactful project for submission for 2015.

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## ***Overview of ALA Emerging Leaders Program***

[Emerging Leaders](#) began in 2007 as one of ALA Immediate Past President Leslie Burger's initiatives. The program enables newer librarians to participate in problem-solving work groups; network with peers; gain an inside look into ALA structure, and have an opportunity to serve the profession in a leadership capacity. It puts them on the fast track to ALA and professional leadership.

Units of ALA come up with potential project topics and assign a staff liaison and member mentor to the project. Emerging Leaders who have been chosen to participate in the program by the EL selection committee chose the projects they want to work on. The program is limited to no more than 50 participants each year.

The EL program kicks off with a day-long session during the ALA Midwinter Meeting. Afterward, it develops an online learning and networking environment for six months. The program culminates with a poster session presentation to display the results of the project planning work of each group at the ALA Annual Conference. Participants *may* be offered an opportunity to serve on an ALA, division, chapter, or round table committee, task force or workgroup as well as other library-related groups upon completion of program.

The program provides financial support of \$1,000 (\$500 per conference) for each Emerging Leader. Sponsors may be any unit of ALA, including Divisions, Round Tables, Chapters, Affiliates, or any Individual. PLA has consistently made contributions to the program, contributing \$2,000 this year with another \$2,000 contribution included in the FY2015 draft budget. Typically, two-thirds of the participants are sponsored by ALA units or external organizations.

## ***Past PLA Emerging Leader Projects***

In past years PLA has submitted EL projects related to the PLA conference. The role of the EL's on the PLA Conference Program Committee has been to incorporate the unique perspective of EL's into the conference planning process. The EL teams were expected to: a) attend meetings of the subcommittee, at ALA Annual and Midwinter through the actual conference; b) assist the subcommittee in identifying/developing program topics for the conference; c) act as program liaisons before and during the conference.

In 2013, PLA submitted a proposal and administered a project related to public awareness. The project description follows.

PLA is interested in discovering what individual libraries have done to transcend misperceptions about the value and future of the public library within their communities through public awareness efforts. These are defined as campaigns whose end goal is influencing perception/raising awareness. They may or may not have a call to action.

This project will require:

1) an environmental scan of public awareness campaigns in PL's; 2) identifying successful campaigns; 3) identifying who planned the campaign (the champions); how it was implemented and costs; 4) defining what constituted success for each community (increased visits to library; circulation; funding; media exposure, etc.); 5) identifying the shared qualities of successful campaigns, what made them successful and how those might be generalized across libraries (and in contrast, if there are things that consistently \*don't\* work, reporting on those as well); 6) if possible, identifying successful campaigns within a range of libraries (rural to urban; those with campaigns that were broadly-focused vs. and those with a more narrow focus); 7) identifying what resources or assistance helped and what additional resources were missing and would have helped the library (successful or not) in better implementing and sustaining the campaign; 8) identifying the successful long-term outcomes from these campaigns and how libraries sustained that success.

The end result of the project would be a report that identifies key characteristics of a successful public awareness campaign and success looks like among libraries. For the purposes of this project, the definition of public awareness is: information sessions, web postings for information, social marketing, advertising and promotion of information, attitudes, values and behaviors to create a climate conducive to social and behavioral change. Public awareness refers to the important role that community enthusiasm and knowledge has in building sustainable institutions.

That EL project team created this resource:

[http://issuu.com/emergingleaders2013/docs/campaigns that made a difference](http://issuu.com/emergingleaders2013/docs/campaigns%20that%20made%20a%20difference)

(Also see a copy of the brochure attached.)

### **Suggested PLA Projects for 2015**

PLA will submit a proposed project by the deadline of October 3, 2014. We would appreciate the Board's guidance on these general ideas:

**1. Focus: Member Engagement.** This project would ask the EL team to identify the needs of new-to-the-profession librarians. What resources, training, levels of engagement are they looking for? What content? What do they want from their association? It might ask them to identify existing resources that they find particularly relevant and that resonate with them and to consider why those work. A project might be a guide to these existing networks and resources or the project could be focused on a "wish list" of new tools and resources PLA might develop.

**2. Focus: Awareness, the perception of the public library.** This project could build on the previous EL project related to public awareness. As the Board finalizes the PLA strategic plan with a likely emphasis on the perception of the public library and building awareness around learning spaces, the project would be informed by the Board's discussion.

**3. Focus: Legislation and Advocacy.** This project would ask the EL team to review existing advocacy and public awareness activities and resources across all of ALA . The final product of this work would be a guide to identifying the right resource for the need. For example, if a librarian needs tips on fundraising, see: X; talking points related to legislative advocacy, see: Y. The key to this project would be the review and analysis of *existing resources*. There is a wealth of resources and

some redundancy. The team would spotlight the best and the easiest-to-use and PLA could promote the resulting tool(s).

**4. Focus: PLA Member Value and Professional Resources.** PLA hosts a "[Professional Tools](#)" resource on our website that includes links to a variety of resources related to administration and management, digital literacy, financial literacy, e-books, advocacy and more. This project would ask the EL team to take an in-depth look at this portion of our website. The team would evaluate existing resources and organization and would produce recommendations for revisions, additions, reorganization of the pages.

**5. Focus: E-Books and the Library's Role in Discovery.** As e-book pricing and sales issues heated up in 2013, PLA hoped to support the work of the ALA Digital Content Working Group through a working group whose charge was to explore the idea of a national e-book program on the one book, one community model. When Overdrive did something similar, the PLA group's focus shifted to other models, especially those that demonstrate the library's role in discovery, with one role for PLA being to identify and review quality e-books published independently. Ultimately, the fact that there was no way to get independently published e-books into the library ILS was an insurmountable barrier and the working group disbanded in late 2013. With the recent Smashwords/Overdrive partnership and other developments, might there be a way to re-start this work? The EL team might focus on how PLA could create a cohort of e-book reviewers and what process they would use to select books to be reviewed. In addition to the selection process, the EL team could find ways to recruit and retain a cohort of reviewers by genre.

# Campaigns That Made a Difference

Emerging Leaders 2013

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**Audrey Barbakoff** is an Adult Services Librarian at Kitsap Regional Library, where she demonstrates her passion for community building and outreach through programs like Ferry Tales, a book group aboard a ferry. She was named a 2013 Library Journal Mover & Shaker and listed in Flavorwire's "10 of the Coolest Librarians Alive." Her articles have appeared in American Libraries, Public Libraries, Library Philosophy and Practice, and In the Library with the Lead Pipe. She has written book chapters for Greening Libraries and Library Services for Multicultural Patrons to Encourage Library Use. She received her MLIS from the iSchool at the University of Washington in 2010. Visit [www.the-bookaneer.com](http://www.the-bookaneer.com) to learn more.

**Ted McCoy** is a children's librarian, currently working in the Oakland Public Library system in Oakland, CA. He serves as a member of ALSC's Great Websites for Kids Committee and 2014 National Institute Task Force. At the conclusion of the 2013 Emerging Leader program, he will begin a two-year term as a member of the ALSC Membership Committee. He is active with the Association of Children's Librarians of Northern California, reviewing books for their monthly BayViews publication and serving as co-chair of their Performer's Showcase Committee. Ted also reviews for School Library Journal. He loves being a children's librarian and is dedicated to fostering genuine connections between public libraries and the communities we serve.



# Biographies



**Anna Johnson** is a Ready to Read Specialist for the Columbus Metropolitan Library in Columbus, Ohio. She trains low-income, at-risk parents and caregivers of children newborn to age five on developing early



literacy skills in the home. She takes the Ready to Read information outside of the library's four walls, going into homes, schools and social service agencies. Anna is also fluent in Spanish and has extensive experience working with the Latino community. Her passion is meeting "people where they are" and building relationships with those who are often in the most need of library services but unable to access them. Anna particularly enjoys working with teen parents as well as helping to develop the Ready to Read Corps, a first of its kind initiative.

## biographies

**Lenore St. John** is the Children's Services Coordinator for the Tulsa City-County Library System. She administers system-wide programs and facilitates interaction between the children's staff members at 25 locations. She works with the Tulsa community to ensure that early literacy initiatives are a top priority by bringing in featured authors and developing innovative early literacy programs such as Sensory Storytimes. Lenore has a Masters in Library and Information Studies from the University of Oklahoma and represents the Oklahoma Library Association as the chair of the Social Responsibilities Round Table. She is also an active part of the Tulsa community as a member of the Junior League of Tulsa.



**Audrey Evans** is a law librarian at Davis Polk & Wardwell in New York City. When she is not researching the law, she is trying to learn how to change it as an information activist. She is primarily interested in intellectual freedom issues, privacy, freedom of expression, censorship, intellectual property, and cultivating the public domain and our cultural commons. She is active in local efforts to support and promote the public libraries of New York City. Audrey also runs a monthly community Storytelling Salon called The Shed. She constantly challenges the sidewalk chalk ordinances of New York City.





Have you ever thought about running a public awareness or advocacy campaign in your library?

Did you wonder if there was some secret to making it successful?

We welcome you to Public Libraries: Campaigns That Made a Difference. This publication is the culmination of our 2013 Emerging Leaders project. The Public Library Association (PLA) tasked our team with beginning to explore successful public awareness campaigns in public libraries around the country.

What made them successful? What do they have in common? What universal lessons could you apply in your own library?

We considered several research methods, but ultimately settled on case studies of nine successful public awareness campaigns. While we hope that future teams will undertake broader surveys to gather complementary quantitative data, we felt that a thorough understanding of what makes a successful campaign would have to begin with an exploration of the qualitative factors through in-depth research and conversation. The discussions we had with directors, administrators, and staff were unbelievably exciting and inspiring. Their passion for their libraries, their communities and their campaigns was nothing short of infectious. We think you will enjoy getting to know them through these pages as much as we have.

The libraries we selected represent a wide range, from a single-location rural library in the Midwest to the 91-branch New York Public Library system. The campaigns also fall into

a variety of categories: some are urgent responses to financial crises while others an exciting boost to an already-successful program. The case studies can be read in any order, so feel free to flip straight to the one that seems most relevant to you. But don't overlook the library systems or campaigns that seem very different from your own; each one reveals several far-reaching lessons that can benefit us all.

We would like to thank ALA for the opportunities and growth we have experienced as part of the Emerging Leaders program, and PLA for sponsoring the project we have enjoyed so much. We do not have the words to express our appreciation and gratitude for the invaluable guidance of our mentor, Manya Shorr from the Omaha Public Library, and our PLA liaison, Lian Sze.

## Happy campaigning,

Audrey Barbakoff, Audrey Evans, Anna Johnson, Ted McCoy, and Lenore St. John



## The Future of the Library

This success story began with a catastrophe. In 2011, the Charlotte-Mecklenburg Library (CML) unexpectedly found itself facing a 50% budget cut. As it considered massive layoffs, branch closures, and severe reductions in service, the library realized that its goals would have to go beyond addressing the overwhelming immediate fiscal problems. Some of those were mitigated in the short term by grassroots community efforts, but this did not address the larger issues that motivated the cuts. The library would have to repair its troubled relationship with its funder, the county.

Looking back, says CML Marketing and Communications Director Cordelia Anderson, the cause of the sudden disaster was “the lack of a strong relationships between the library and the county.” The county truly did not understand how deeply this cut would affect the library; it didn’t know how the budget was structured. When the library reacted with a plan to close half the branches, it was met with disbelief and a perception that it was overplaying the problem to elicit community support. To overcome this misunderstanding and mistrust, the library realized it had to take the first step towards compromise.

### *The Campaign*

First, the library put together a “sustainability plan” which focused on one primary goal: avoiding branch closures.

It made concessions to the county, such as consolidating security and maintenance; in return, the county credited the savings to the library. The library identified four branches that would be the least impactful to close, and cut back on hours and services system-wide. It redoubled its efforts to be transparent, inviting the town finance director and the media to public forums and reaching out to individual commissioners. In addition to mitigating some of the immediate financial impacts, these conversations with the county created a space for dialogue and relationship building.



Ultimately, the county and the library realized they could work together with the community to create a long-term solution. A 17-member coalition of interested and objective citizens, called The Future of the Library Task Force, was convened. The library created a CEO role to help implement its recommendations. The li-

*Public support has borne out the power of the library learning to tell its story.*

brary also ensured that the process had a strong media presence, and that it told the community its story cogently through this media.

Overall, this campaign was successful because the doomsday fiscal scenario was mitigated, and many of the cuts to staff and hours have since been slowly restored. More importantly, the library and the county built a strong, trusting relationship that will ensure long-term library sustainability. The Foundation for the Carolinas, which provided funding for the task force, wrote that this initiative was “widely seen as a success.” Public support has borne out the power of the library learning to tell its story; survey results show that community members considered the library even more important in 2013 than they did in 2011.

CML’s campaign to save its libraries has several key takeaways. The first is to learn to tell your financial story. In the beginning of the process, the library realized that it merely reacted while others were telling its story. It needed to be in control of its own image. “Never in a million years” did Ms. Anderson think she and her staff would become experts in public funding. However, demonstrating to the public that the library is a good steward of its funds proved essential to building trust. “I memorized a lot of numbers and had to be able to explain them to people who

don’t do public budgets for a living,” she says.

Second, improving relationships and communication with funders is critical for long-term financial sustainability. Transparency and willingness to compromise are essential. A lack of understanding about the library’s budget led to severe cuts, but a willingness to make concessions and consider all possible solutions won back the trust of county officials and the public.

*“Once there was something for the public to rally around, even if it wasn’t perfect, they could get on board.”*

Finally, come forward with a solution, not a problem. “Oh my god, we have to lay off staff and cut hours’ isn’t a rallying message,” says Ms. Anderson.

“And it made people turn on the library. Once there was something for the public to rally around, even if it wasn’t perfect, they could get on board.” For issues large or small, leading with solutions is crucial.



## Keep CML Strong

In 2010, Columbus, OH's Columbus Metropolitan Library (CML) needed voters' help to keep the library strong. The library sought to pass an operational levy in order to keep half of its twenty-one locations open and restore reduced hours of operation due to cuts in state funding and other revenue sources.

Asking for additional taxes during a time where taxpayers were already feeling financially burdened was a daunting task. Furthermore, CML would need to prove the value of the library to all registered voters, rather than just its cardholders. In order to reach this wider audience, it launched the Keep CML Strong Campaign.

### *The Campaign*

The goal of Keep CML Strong was simple: passage of the levy to support library funding in Columbus. Fifty-one percent voter approval was needed to restore hours of operation, make necessary updates to buildings and technology, and provide customers with continued quality programming and services. Alison Circle, CML's current CXO, served as Director of Marketing during the campaign. She explained the message of the campaign was multi-tiered to suit the wide array of voters going to the polls.

To gain the vote of the cardholders, the library would have to show both how their vote was contributing to the larger picture of improved library



services and how their local branch was part of a larger system.

To this end, each branch displayed statistics of their services and programs such as the homework help centers, job help centers, and check-outs, as well as photos of branch staff in action. This helped demonstrate how a vote for CML was vital to maintaining these programs in their local branch. For registered voters without library cards, the library had to prove its worth to the community. Alison Circle explained that its message to these voters was that the library is "a well-managed institution of value to the community. We are fiscally responsible; it was no coincidence that our CFO was named 2010 CFO of the

*Yard signs, radio and television ads, literature drops, newspaper editorials, and social media were all utilized to advocate for the levy.*

year. Columbus Metropolitan Library, Library Journal's 2010 Library of the Year, also had a place among Columbus's number one ranked zoo and science center."

Another strategy to demonstrate CML's value to the community began years prior to the operational levy. A massive rebranding effort was undertaken to showcase how current and modern the library was. This effort specifically highlighted several library staff members, according to Circle, to "show that in the age of Google, our people are an invaluable resource." Before the 2010 election season, the library left no potential message outlet untapped. Yard signs, radio and television ads, literature drops, newspaper editorials, and social media were all utilized to advocate for the

*"The approach  
was to make  
the complex  
simple."*

institution of value to the community. In some of the most difficult financial times since the Great

Depression, the library gained the support of taxpayers, library cardholders and non-card holders alike.



levy. This proved no easy task. Library staff was specifically trained to stay on message when working with the public, providing information only and avoiding library advocacy while using library resources or during paid time.

### *The Takeaways*

Even with the complex, challenging nature of the Keep CML Strong campaign, its efforts proved successful when the levy passed by 66%. The approach was to make the complex simple in the message that the CML is a well-managed

## Library Card Sign-Up

The New York Public Library may be a behemoth public library system by most standards, but the 91 branch library system still struggles with the same issues that smaller public libraries face daily. At the forefront of these: how can libraries authentically engage with their communities?

### *The Campaign*

This question was an animating force behind NYPL's 2012 Library Card Sign-Up Campaign. The campaign was a focused, 30-day engagement that centered on sharing quotes from well-known and influential New Yorkers describing how and why the library is valuable to them. The quotes were paired with a straightforward invitation to sign up for a library card online.

Johannes Neuer, working in conjunction with the marketing and PR teams at NYPL, explained that at the outset of the campaign, the team's only goal was to increase sign-ups. But they also set out with an experimental mindset that aimed to reach as many people in its community as possible with messages that they knew would resonate.

When planning the design for their campaign, Johannes and his team thought carefully about the type of content that had been successful in the past. The most successful interactions on social media over the past two years had come from quotes. This fact inspired them to take a risk and build their

*"The campaign was successful because it spoke to people. It hit in an emotional spot."*

entire campaign around quotes from celebrities, authors, writers, and others in their community who had something nice to say about

the library. They gathered 30 contributions -- one for each day in September. Once the campaign launched, it was all down to the discipline of executing and pushing out the content every single day for the duration of the month.

This campaign was successful in two ways: first, it significantly increased library card sign-ups. There were 21% more library card sign-ups in 2012 than in 2011, and 35% more than the average monthly online sign-ups during the previous year. But there was also another hidden vein of success that emerged: the library saw an enormous increase

*"Google can bring you back 100,000 answers, a librarian can bring you back the right one."*

—Neil Gaiman



Get A Library Card!  
[www.nypl.org/getacard](http://www.nypl.org/getacard)  
September is National Library Card Sign-up Month

in interactions across all platforms -- Facebook, Twitter, Tumblr, Google +, and Pinterest. People were sharing this content, liking it, and commenting

on it. They were making it their own. Facebook was the largest contributor to the campaign's success, generating about 70% of the interactions. The Facebook page averaged 720 interactions per post over the entire month. Community members were clearly excited to have content that they could identify with and share among their peers that demonstrated their support for the library.

Johannes sums up the success of this public awareness campaign by reflecting: "I think the campaign was successful because it spoke to people. It hit in an emotional spot that people can identify with. Reading and books and literacy -- those are really important topics to people who are in the social media community around NYPL."

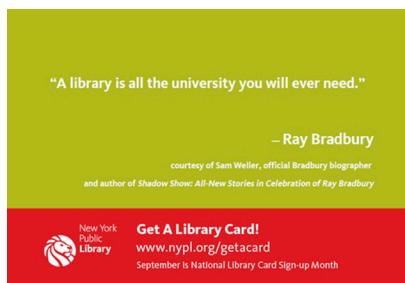
Importantly, NYPL was able to reach out to a broader community by leveraging the power of its various social networks. Because they had so many interactions on their posts, each daily message became viral and they were able to reach the outer edges of the network. Johannes believes that this is how the library was able to reach new people who were interested in becoming library card holders.

## The Takeaways

By thoughtfully developing the content and strategy behind public awareness campaign, the NYPL team was able to simultaneously communicate the value of their institution, engage their community in propagating and sharing this message with a wider audience, and also accomplish their short-term goal of

increasing library card sign-ups.

Johannes was careful to note that he does not believe a library needs marketing and publicity departments to execute this type of strategic public awareness



outreach. It is more a matter of finding the best voices in your community that can advocate on your behalf and then giving them a platform to do so.

"If you have a library board or people who are influential in the community -- develop these relationships and leverage them to find the people that can speak out on behalf of your library -- it could be the mayor, local sports celebrities, literally anyone who can become an advocate of your library.

*"Get creative with what you have that is unique about your community and the people you serve. These are the people who can advocate for you."*

The most important part of the campaign is the inspiration. Get creative with what you have that is unique about your community and the people you serve. These are the people who can advocate for you."

## In Touch

**I**n 2011, Butte County Library (BCL) launched the “In Touch with Parents about Literacy Services” campaign, with the primary goal of increasing enrollment in the BCL Adult Reading Program, a program offering literacy coaching and support for adult learners. Specific focus was placed on reaching out to parents of young children who might benefit from adult literacy services. BCL primarily measured success for the “In Touch” campaign by increased enrollment in Adult Reading Program, though it was also important to raise

*“What is good for literacy is good for the library!”*

awareness of BCL and its Adult Reading Program as a resource for the community. As

BCL library literacy specialist and campaign organizer Carey Gross observed, “What is good for literacy is good for the library!”

### The Campaign

The “In Touch” campaign adopted a two-part strategy. High visibility campaign materials were created to reach out to adults who might be interested in or benefit from a literacy program. These consisted of four banners to be displayed outside libraries, as well as four different posters and informational business cards. This approach was developed largely with former and current adult learners offering both feedback on what made the program successful to them,

and highly valued suggestions as to what would best reach out to potential adult learners. Next, “In Touch” utilized the BCL Literacy Coach, a 36-foot customized vehicle that travels throughout the county providing storytimes, to get the word into homes of parents with

**Be an even BIGGER hero!**

**Your library can help!**

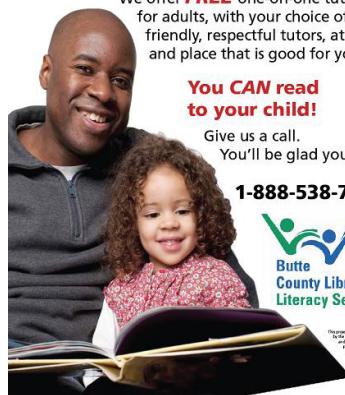
If you or someone you know wants help with reading and writing, give us a call.

We offer **FREE** one-on-one tutoring for adults, with your choice of friendly, respectful tutors, at a time and place that is good for you.

**You CAN read to your child!**

Give us a call.  
You'll be glad you did.

**1-888-538-7198**



**Butte County Library Literacy Services**

The project is supported in part by the U.S. Institute of Museum and Library Services, Library Services and Technology Act funds.

young children. During Literacy Coach storytimes, children were given what were described to them as “very important” envelopes of information from the library to be shared with the grownups in their lives, including materials about the BCL Adult Reading Program and a “magic key” that could be brought into library and transformed into a “real”

library card. While there was no precise tracking method, this inventive approach likely reached adult learners and parents who otherwise would not have known about the adult literacy resources available to them.

BCL's "In Touch" campaign was extremely successful. Achieving its primary purpose, BCL saw an increase in program enrollment as well as in the number of volunteer tutors. "In Touch" also directly led to a wide range of invitations for BCL Literacy Staff, almost always accompanied by adult learners, to speak about the Adult Reading Program to community groups ranging from Friends of the Library to museum docents to the Elks to a meeting consisting of over fifty employment case managers and a presentation to County Board of Supervisors. BCL further cemented their close relationship with First 5 Butte County, developing and printing some of the campaign materials to be used with Literacy Coach storytimes. In addition, adult learners, tutors and volunteers helped canvas the community with "In Touch with Parents about Literacy Services" posters, helping create a real sense of community and partnership especially for those who were actively involved when, for example, they walked into a business or an agency and saw one of the "In Touch" posters prominently displayed.

### *The Takeaways*

Three key takeaways can be pulled from BCL's In Touch with Parents about Literacy campaign. Firstly, while increas-



ing Adult Reading Program enrollment was the campaign focus, it was equally important to raise awareness of the library as a valuable resource for the local community. Secondly, for a campaign designed to reach adult learners, real strategic success and authentic messaging came from incorporating feedback from former and current adult learners about what was and could be successful, rather than relying solely on internal planning efforts. Finally, libraries should

*libraries should approach campaigns with gusto and without reservation, even when moving into uncharted territory*

approach campaigns with gusto and without reservation, even when moving into uncharted territory; undue worrying or concern for worst case scenarios can drain institutional time and energy.

## You Belong @ Your Library

Sacramento Public Library (SPL) launched the You Belong @ Your Library campaign in 2012, with the primary goal of improving and expanding how welcoming SPL was to Sacramento's GLBT community, as an extension of its institutional commitment to ensuring SPL welcomes all people to the library. SPL measured success for the campaign in three ways. It first sought to raise public awareness of the library's fully inclusive nature and its value to the Sacramento GLBT community. It then looked to form partnerships with community groups such as the Lavender Library, Rainbow Chamber of Commerce, and PFLAG, among others, providing these groups' members an understanding of their real stake in their public library. Finally, it sought to create a welcoming atmosphere and sense of investment for every person in Sacramento in all 28 SPL branches.

### The Campaign

You Belong @ Your Library cumulated in a week of inclusive programming specifically focused on Sacramento's GLBT community and targeted at all ages during National Library Week 2012. These programs included a Rainbow Family Egg Hunt and GLBT storytime, with over 300 eggs hidden throughout the library and its grounds, with a single golden egg hidden where the answers to all your questions in the library can be found: on the librarian. Other programs included a GLBT Community Partner

Brown Bag Lunch at the Central Library, a "Come Out! for Aerobics" program, an "It Gets Better" video filming drop in, an GLBT movie night at the SPL Tsakopoulos Library Galleria (screening But I'm a Cheerleader and offering Just Dance gaming on Xbox Kinect), and Same Sex Speed Dating for Book Lovers. By all measures, the You Belong @ Your



Library campaign was a great success. In addition to the individual programs' successes, which brought GLBT community members who may otherwise not have been utilizing SPL resources into the library, the campaign had a range of lasting impacts. Patrons requested another Rainbow Family Egg Hunt in 2013, for instance, and the ongoing Rainbow Family Storytime is still receiving media attention. Further, SPL's GLBT collec-

*campaigns like You Belong @ Your Library “bring people in and make them feel invested in their libraries, and that’s how libraries stay alive.”*

tion has grown significantly, as has its circulation, due in large part to increased awareness of its availability. Though some individual programs had lower than hoped-for attendance, a welcoming community

was developed and the message sent that the library is a place for everyone. As SPL Branch Supervisor and campaign co-coordinator Jessica Zaker noted, campaigns like You Belong @ Your Library “bring people in and make them feel invested in their libraries, and that’s how libraries stay alive.”

SPL continues to build on the “You Belong @ Your Library” campaign momentum by strengthening its ongoing relationship with Sacramento’s GLBT community in a variety of ways. SPL hosted a table at Sacramento Pride, offering booklists and campaign promotional materials. SPL librarians guest-judged a Gender Health Center spelling bee fundraiser. All 28 SPL libraries feature You Belong @ Your Library signage, as well as other promotional material. SPL librarians also include Gay Pride Month and National Coming Out Day in their programming calendars, and SPL is continuing the “Come Out and Read” book club originally started at the North Sacramento Library at the Sacramento Gay & Lesbian Center.

Approximately 85% of “You Belong @ Your Library” program participants

surveyed significantly enjoyed the programs, “totally” felt they belonged at their library, and would like to see more of the type of programs offered during the campaign. “You Belong @ Your Library” received positive feedback online, including enthusiastic Facebook posts and tweets such as, “This is amazing. Way to go, Sacramento Public Library! Good luck with your programming next week!” and “Go @saclib! Love working with/supporting a library that stands for such positivity and acceptance #youbelongatyourlibrary.”

### *The Takeaways*

Three key takeaways may be gleaned from SPL’s “You Belong @ Your Library” campaign. First, aggressive, strategically planned advertising is critical to reaching the community outside of the library; free and online advertising, especially social media, offers an excellent return on investment in this area. Second, librarians need to “stand up and be willing to be media liaisons,” observed Zaker, interacting with the community outside of the library and proactively serving as campaign point persons rather than shying away from the media and community.

*“librarians need to stand up and be willing to be media liaisons”*

Finally, personal commitment to and passion for community outreach often drives successful public library campaigns.

## Anythink Rebrand

**O**n September 12, 2009, the Rangeview Public Library in Colorado reopened its doors as the newly rebranded Anythink. In the wake of a successful 2006 library levy which took the annual budget from \$4 million, the lowest in the state, to \$12 million, this underutilized system realized it had an opportunity to transform itself. Its ambitious goal was to become a relevant, vibrant “library of the future.”

To achieve this goal, the library hired a visionary new director, Pam Sandlian Smith. She challenged the board and the staff to think about the kind of library they wanted to be, how they wanted to serve their community. The result was the Experience Model, which guides every aspect of the new library. The Experience Model “really [focuses] on the experience of the customer when they come into the library,”



says Communications Director Stacie Ledden. “[There’s] a huge emphasis on hospitality.” As they began to examine the barriers to an excellent customer

experience, the team saw that nearly every area of the library was ripe for change. They rewrote their value and



mission statements, jettisoned Dewey in favor of WordThink, eliminated overdue fines, and restructured all their job descriptions. Soon, they realized that the staid Rangeview Public Library brand no longer represented this new paradigm. The library needed a new brand. With the help of a local marketing team and nine months of intensive internal work by the staff, Anythink was born.

### *The Campaign*

Rather than reaching for specific quantitative milestones, the library measured success in this campaign by the newfound pride and ownership its community and staff felt towards the library culture. Its success was clear and immediate. With so many changes, it was impossible to identify which ones were directly responsible for the community response, but the numbers “shot up.” Circulation at the new flagship branch alone surpassed the previous record for

district-wide circulation. The percentage of cardholders in the community nearly doubled. Even more importantly, the staff had bought in deeply to the new vision and brand. They spoke with one enthusiastic voice about the change. “One of the best compliments that I’ve heard,” says Ms. Ledden, is “It doesn’t matter who you talk to in this organization; you guys all kind of talk the same way about [the library].” The national recognition the library has received, including winning the national medal from the IMLS, is validation of Anythink’s value to its community.

## The Takeaways

While not every library will choose to undergo a transformation of this magnitude, a few key findings from this

*“Develop a very specific vision of who you want to be, let that united vision influence all areas of the library.”*

campaign have universal applications. First, develop “a very specific vision of who you want to be,” says Ms. Ledden. Let that united vision influence all areas of

the library; your space, your culture, your brand. “There’s a misconception about Anythink that we disrupt just to be disruptive, but everything we have done has been very strategic – it goes back to those core values, that core mission.” Second, create a brand. It is “the flag that you march behind.” Anythink has a single, clear voice because of its brand. It helps the staff feel like they are part of

*“Everything we have done has been very strategic – it goes back to those core values, that core mission.”*

something bigger than themselves, and it creates a personality that the community can relate to, that resonates. Even though the library already had an idea of where it wanted to go, the brand gave staff the language to describe it clearly. Essentially, what we learn from Anythink is a meaningful way to fully, deeply apply something the library industry often discusses but does not always accomplish: the power of storytelling.



## Geek the Library

In 2009, Julie Hildebrand became Director of the Independence Public Library (IPL) in Independence, Kansas. Both the library and the surrounding community were struggling to recover their footing in the aftermath of the financial crisis. Julie and her small staff of eight were desperate to find a way to connect to and help their community in a stark fiscal environment.

After a futile brainstorming session where they failed to think up a catchy branding idea or slogan, they began to look into pilot public awareness campaigns they could adopt. They found exactly what they needed in OCLC's Geek the Library campaign. They jumped on board set about wholeheartedly adopting the campaign as their own.

### The Campaign

The Geek the Library campaign is centered on finding and publicly celebrating the passions of library users in the community. By calling out these enthusiasms (I Geek \_\_\_\_\_) and associating them directly with the library, the library is implicated as a unique platform to explore, develop, celebrate, and cultivate the interests of community members. "Geeking" the library is equated with the love and excitement patrons feel about their own personal passions. Hence, having any kind of passion or curiosity

*"It creates a simple yet effective positive feedback loop."*

implies that the patron "geeks" the library as well. It creates a simple yet effective positive enthusiasm feedback loop . It is just the sort of jolt of positivity that a library and community needed in the middle of a deep recession.

When IPL implemented the Geek the Library campaign, they took the aesthetic and design elements from the Geek campaign and tailored them to directly reflect the image and needs of their own community. The library did this by inviting the community to become involved in creating the content of the campaign. The Chamber of Commerce became a participant after IPL



held an after-hours event in which staff invited local business leaders to get their portraits taken for their very own Geek the Library poster. These posters were put up in the library and throughout the

downtown area. The goal was to signify a connection, alliance, and synergy between the downtown business community and the public library.

The library furthered this connection when staff member Kriztina Smith developed the Geek the Library Tour. The Geek Tour began with staff



members at IPL writing up reviews about their favorite books. These reviews were put onto posters and given to local downtown business owners to display in their stores. If customers wanted to participate in The Geek Tour, they would keep a list of every book that was displayed in every single local downtown business. After a patron collected all the titles, he or she could bring the list to the library for a gift card to one of the

*"We wanted to do something that would not just help the library, but something that would help out a community that was suffering."*

local businesses. The idea behind this interactive campaign was to get people to step inside the downtown businesses and tie the businesses and the

library together -- again, creating and building a relationship where none may have existed before.

Julie Hildebrand explained: "We wanted to do something that would not just help the library, but something that would help out a community that was suffering. And then, in doing that, we would be advocating for our library, as well as having community members advocating for our library because we were helping the community. That was our main idea for 'I Geek Local.'"

## *The Takeaways*

Julie had sage advice for any local public library looking to implement its own marketing or advocacy campaign: "It takes time and it takes marketing to make it successful. It takes a good support network from the Friends of the Library. Get your board involved. Create

*"Share the load of trying to advocate for the library. And don't be afraid to ask for help"*

the partnerships in the community so that you're not the ones doing all the work. That's why we partnered with local businesses. Share the

load of trying to advocate for the library.  
And don't be afraid to ask for help.

What made Geek the Library so appealing for us is that everything was on their website. Everything was already at your fingertips. We never would have pulled it off ourselves. The branded materials gave us identity beyond just the library... It gave us a platform for our advocacy."

## Snap & Go and Discover & Go

The Contra Costa County Library in California is a 26 branch public library system serving a predominantly commuting population. Like many urban library systems, Contra Costa County Library wanted to increase patronage and reach people who were not already familiar with library services.

In 2010, when libraries in England and Europe began using Quick Response (QR) codes in their catalogs, the virtual library began brainstorming ways to incorporate QR codes into marketing library services to patrons out in the community. Information Systems Manager Paula MacKinnon wanted to create a mobile platform to expand the community that the Contra Costa County Library served.

### *The Campaign*

This was the beginning of the Snap & Go Library Advertising Campaign that the library launched in 2010. QR code advertisements can be found all around Contra Costa County. One of the most successful advertisements features a large advertisement with a colorful word cloud and a large QR code. These advertisements can be found at Bay Area Rapid Transit (BART) stations starting at the MacArthur station and moving into Contra Costa County stops. BART users can use their smartphones to scan the QR code from the library poster. They are then directed to the Contra Costa County Library's Snap & Go mo-

bile library access, which allows users to download a maximum of five audiobooks directly onto their cell phone and enjoy an E-book while commuting to their destination.

This advertising campaign led to successful media exposure and significantly increased use. In 2010, the Contra



County Costa Library did not yet have a mobile site. Over the course of that year, the usage of the mobile app increased steadily every month. As of 2012, this campaign has led to over three million virtual visits to the library website each year.

This campaign led to other Snap & Go features that the library could promote within the community besides E-book downloads. The success of this campaign led to the adding of QR codes to books at the branches in which patrons can scan to access read-alike lists of that title, as well as a top ten book list. The Contra Costa County Library also uses Snap & Go QR codes to advertise the Contra Costa County

Library's text reference service, Summer Reading Programs, and even a Snap & Go Scavenger Hunt.

## The Takeaways

MacKinnon shared some insight in the implementation of the Snap & Go campaign. She discussed the importance of thinking outside of the box and reaching patrons at where they are. The Snap & Go campaign has been successful because each advertisement markets one particular service that is relevant to the community that represents a particular area. At the time, the technical component of building a mobile website was daunting and new to them. Not being afraid of trying something new and the support of her colleagues was integral to the success of this program and led to implementation of another relatively new campaign called Discover & Go.

The Discover & Go campaign was also created to serve the "customer on the go" with a collaboration be-

"*This campaign has led to over three million virtual visits to the library website each year.*"

& Go was "created as a direct response to the Library's Community Needs Assessment where parents identified their preferences

for library programs that provide accessible low-cost cultural activities for families, programs that tie-in with the arts, and programs that support easy, independent exploration.

Discover & Go is a new library campaign allowing Contra County library card holders access to museum passes online. MacKinnon states that this program "works the way patrons want it to work" -- library users can make reservations online by date or venue and print out the a pass with no returns or overdue fines. Patrons without internet access may reserve a pass via telephone or in person.

Currently, the Discover & Go program has partnered with 40 museums. Contra Costa County Libraries provide museums with educational resources and programming. In turn, library patrons have free access to partnering museums. Funded by a grant from the Institute of Museum and Library Services, the partnership between libraries and museums is synonymous with their goal to engage patrons in lifelong learning. The Discover & Go campaign aims to bring other museums within Southern California to work with libraries.



tween libraries and museums in order to increase cultural literacy through the virtual library. Cathy Sanford, Deputy Council Librarian, states that Discover

## Harry Potter Read-A-Thon

**F**or Jennifer Baker, Director of the St. Helena Public Library in St. Helena, California, the inspiration came to her on a random weekday morning: a non-stop reading of Harry Potter novels at the library. An avid reader and fan of J.K. Rowling's Harry Potter series, she wanted to share her love for the series with patrons that enjoyed discussing books and movies just as much as she did. This inspired concept also had the potential for engaging with and addressing the needs of the library's evolving user base.

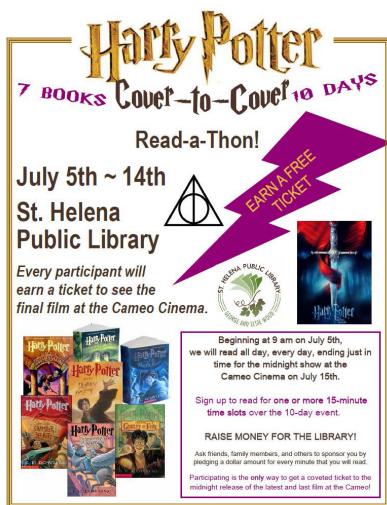
St. Helena is a small town of roughly 6,000 residents, with many new

ing Spanish-speaking population also represented a new user group the library sought to effectively serve. St. Helena Public Library wanted to bring users of all ages and backgrounds through its doors while encouraging new users to utilize library resources.

### *The Campaign*

Baker wanted to "ride the coattails of Harry Potter's popularity" and take advantage of both the books' universal appeal and the buzz surrounding the 2011 release of the franchise's final film, Harry Potter and the Deathly Hallows: Part 2, with the Harry Potter Cover-to-Cover campaign. The campaign would celebrate the love of reading and reading aloud, as well as increase awareness of library services and the library's role in the St. Helena's community, creating a new way for residents to get involved and support their library.

The campaign's centerpiece was a ten-day continuous read-a-thon, with participants reading for fifteen minutes each, with the goal of reading the entire seven book Harry Potter series aloud in time to watch a special midnight premiere of Harry Potter and the Deathly Hallows: Part 2. When participants read during their designated time slot, they received a ticket to the special library screening. The campaign also featured such complementary programming as a Harry Potter costume contest, tea party,



families moving in from larger, surrounding towns and cities, creating a multi-generational demographic. Its grow-

*"People in town were talking about that 'Harry Potter thing at the library' for months after the campaign ended."*

years old, reading in both English and Spanish. The campaign received media coverage and gave the entire community something to share and get excited about. Baker noted "people in town were talking about that 'Harry Potter thing at the library' for months after the campaign ended."

### *The Takeaways*

Ms. Baker also shared some key lessons learned from the Harry Potter Cover-to-Cover campaign. It was important to take advantage of a unique opportunity and cultural touchstone like Harry Potter. This book-to-film franchise provided a great avenue to develop new partnerships within the community. By buying out the midnight showing of Harry Potter and the Deathly Hallows: Part 2, the library was able to support their local movie theater, which in turn advertised for the programs at the library. This community partnership has continued with the campaigns featuring other book-to-movie franchises such as The Hunger Games, Oz the Great and

book discussion, and three-day movie marathon at the library. The campaign proved to be a great success, with every reading slot filled with local residents ranging from six to eighty

Powerful, and Life of Pi. Furthermore, Ms. Baker observed that it is important not to be afraid to let a campaign change course. The Harry Potter Cover-to-Cover campaign initially started out as a fundraiser asking participants to pledge for each minute read. Once Baker saw the struggle for pledges to come in, the requirement was dropped to avoid dampening public enthusiasm; the campaign's success owes much to this flexibility. In addition, the campaign proved to be so successful that the library was

*"It is important not to be afraid to let a campaign change course."*

able to staff a new teen services position because of the newly increased numbers of young people coming through their doors.

In *Campaigns That Made A Difference*, we explored nine diverse campaigns from public libraries across the United States and identified some key factors that contributed to the success of each campaign. We hope this magazine can offer some guidance to anyone looking to plan or implement a successful public library awareness campaign.

Public library campaigns seeking to expand resources or community relationships are dependent on a well-defined strategy. Having a specific vision of who you want to be and the role you want to play in your community is essential. It is this vision that drives successful campaigns -- especially those campaigns where you seek to reinvent your space, culture, or brand. Advertising outside of the library should be aggressive and consistent. Exploiting free and online advertising (social media in particular) were time and time again demonstrated to be an excellent return on investment. Librarians and staff must not be afraid to venture outside out of their comfort zones and connect with the community. Librarians should be willing and enthusiastic to act as media liaisons for a campaign's brand and message.

When defining a library's vision for itself, knowing the audience you are trying to reach is critical. Successful resource and relationship-oriented campaigns focus on what patrons want

from their libraries, rather than on libraries' perception of their patron needs. Thinking outside of the box and utilizing community partnerships to reach a broader audience allows a campaign to better hone in on patron needs.

Financial campaigns, on the other hand, require libraries to tell an effective story. Our stories cannot be overly complex; the message needs to be presented with clarity and with minimal distracting detail. Likewise, libraries can't simply present a problem. Our communities tend to rally around solutions, not problems. Financial campaigns demand that libraries improve relationships and communication with their stakeholders and funders.

Campaigns seeking to increase quantifiable use of library resources must be approached with gusto and without reservation. These campaigns should also not shy away from raising awareness of the library and its programs as a community resource. This awareness often directly translates into quantifiable increases in library usage. As elsewhere, social media provides an incredibly powerful tool for raising public awareness. Community advocates, from the mayor to local sports celebrities, can highlight your unique service to the community while simultaneously advocating on behalf of your library.

Whether raising money to keep a branch open, increasing the number of library cardholders, or simply heightening a community's awareness of services, public libraries depend on successful campaigns to survive and thrive. With the case studies and key factors presented in this publication, we hope all public libraries will find useful tools to effectively plan and implement the campaign they need.

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