

**RUSA President's Annual Report to
ALA Council
May 2019
Ann K. G. Brown, RUSA President 2018-2019**

RUSA had a busy and productive year in 2018-19. Our major focus was on creating a new vision statement and complete a new strategic plan, positioning RUSA to meet the evolving and future needs of its members. We also transitioned to a new executive director for the second time in less than a year. This has provided both challenges and amazing opportunities for us to nimbly move to the future.

Our New Vision

The Reference and User Services Association is a network to educate, empower, and inspire its members to advance the evolution of the profession and better serve users in a continuously changing information society.

Highlights

Highlights included work towards a new vision statement and strategic plan, a census of current committees and their role in RUSA's future, a Cultural Norms document aligning the values of RUSA and the Board, and input into the work of the ALA's Steering Committee on Organizational Effectiveness (SCOE).

Progress on the RUSA 2019-22 Strategic Plan

RUSA leadership has led the effort this year in developing for RUSA a new 3-year Strategic Plan. The process has involved a dedicated effort by the RUSA Board as well as input from the full RUSA membership. As part of the process, we asked librarians of all divisions and areas what excites them about the future of reference and user services. With an overwhelming 400 responses, we were able to lay the valuable foundation for the work that followed in creating RUSA's updated mission, vision and values.

Throughout the process, a consistent effort has been made to make the Strategic Planning work as inclusive as possible by including both the RUSA Leadership Council as well as RUSA's Board of Directors. RUSA's strength lies in the vast wealth of experience and knowledge of its diverse and dedicated membership. Making the effort to solicit feedback and input from this broad base of RUSA members has resulted in developing a Strategic Plan that should guide RUSA capably forward for years to come.

The strategic planning process is now nearing completion. The final plan is expected to be completed and approved after Annual Conference.

RUSA Cultural Norms

In an effort to support and guide the RUSA Board of Directors work during the strategic planning process, the Board's cultural alignment was examined in order to confirm that it mirrored the values and norms the Board and RUSA hold in high regard. This examination and discussion led to the creation of a [Cultural Norms](#) document.

Within the document, Norms were established and consisted of: Collective Action, Respect of Shared Resources, Focus on the Future, Develop an inclusive culture, and Culture of Learning.

Each Norm then listed Examples of behaviors and Coaching one another. This process focused the RUSA board on the values it was willing to promote and stand behind.

Census of RUSA Committees

This year RUSA has taken time and effort to assess how all its committees are currently operating and if the work being performed is still in alignment with RUSA's overall resources and activities. This effort has been led by RUSA President-Elect Beth German. With nearly 80 active committees, not counting award committees, RUSA felt it important to assess which committees were currently still working to support their initial charge and best positioned to support RUSA in its work going forward, and which committees may be no longer as viable and could be considered for sunseting.

The census questionnaire was sent to the Chairs and Vice-Chairs of all RUSA and Section committees. The questions in the census were designed to help the RUSA Board, Section leadership, and the RUSA Office find common connections and be able to reflect on how we might better align our resources and activities.

This census remains ongoing and work will likely continue into the next membership year.

Input on the work of the ALA's Steering Committee on Organizational Effectiveness

Following the presentation at Midwinter of the division SCOE proposals for division model review, RUSA executive leadership (Interim Executive Director, Bill Ladewski; President, Ann Brown; and Vice-President/President-Elect, Elizabeth German) met to discuss the proposals and the potential impact to RUSA. In this conversation, an alternative model was developed that builds upon the ideas presented but also added additional context in order to ensure that the needs of reference and user services were addressed.

The alternative model was based with several perspectives and ideas:

- We should not be positional about our association but advocate for those working in reference and user services.
- We acknowledge that all groups within ALA are also advocating for their constituencies.
- The model should be inclusive, equitable, and represent shared governance.
- The labor of our professional staff, elected leaders, and volunteers should be visible.

- RUSA members, volunteers, and professional staff should be able to see how they fit in the new model.
- The value of RUSA programs, awards, and services should be respected and honored in the new model.
- The focus of the model should be on the member and what the member gets out of their ALA membership.

The proposed model was shared with the Chair of SCOE and follow up conversations were held with the Chair to discuss how aspects might be incorporated into SCOE's work. It is RUSA's hope that the final recommendations presented by SCOE take into consideration aspects presented in RUSA's model. The full RUSA alternative model can be found [here](#).

Other Highlights for the Year

Awards

RUSA would like to thank all our award committees for their dedicated and tireless work overseeing the many selections that comprise both the Achievement and Book and Media Awards.

Achievement Awards

RUSA will acknowledge numerous division and section Achievement Awards at Annual Conference. For a list of the award winners, see <https://rusaupdate.org/2019/05/rusas-2019-award-winners/>.

Book and Media Awards

Andrew Carnegie Medals for Excellence in Fiction and Nonfiction

RUSA announced the winners of the Andrew Carnegie Medals for Excellence in Fiction and Nonfiction at Midwinter 2019. "The Great Believers," by Rebecca Makkai, published by Viking, was the winner of the 2019 Andrew Carnegie Medal for Excellence in Fiction, and "Heavy: An American Memoir," by Kiese Laymon, published by Scribner, was the winner of the 2019 Andrew Carnegie Medal for Excellence in Nonfiction. The award ceremony will be held June 22, 2019 at 8:00 pm. The event is supported by RUSA, Booklist, and the ALA Development Office.

Book and Media Awards Ceremony

RUSA's Book and Media Awards were announced at Midwinter and awards were presented at a very well attended ceremony with approximately 200 attendees.

The winners of our other Book and Media Awards – Notable Book List, Reading List, Listen List and Outstanding Reference Sources selections, the Dartmouth Medal for Excellence in Reference, the Sophie Brody Medal for Jewish literature, the Zora Neale Hurston Award for Achievement in Promoting African-American Literature and the Louis Shores Award for Book Reviewing – can be found on RUSA Update at <https://www.rusaupdate.org/category/awards/book-and-media/>.

Publications

RUSA's notable open access journal, *Reference & User Services Quarterly (RUSQ)* delivers quality research articles, columns and reviews. Kathleen Kern, the new editor, started in July 2018. In addition to RUSQ, RUSA publishes *RUSA News* regularly on [RUSA Update](#), sends weekly email news updates to members, and issues a member-edited *Quarterly Update* online newsletter with section news.

Notable RUSA Section and Interest Group Activities

RUSA has six sections reflecting a diversity of professional interests: Business Reference and Services Section (BRASS), Collection Development and Evaluation Section (CODES), Emerging Technologies Section (ETS), History Section (HS), Reference Services Section (RSS), and Sharing and Transforming Access to Resources Section (STARS). The sections contribute in their unique ways to making for a vibrant association. Here are a few of their accomplishments from the past year.

BRASS

BRASS has had a busy year transitioning to new models of operation after the disruptive changes at the ALA Annual Conference 2018 in New Orleans. Our goal is to continue delivering value and a sense of community to our members. The BRASS Executive Committee led an effort to harness ALA Connect as a platform for communication and knowledge transfer. We worked with the RUSA and ALA IT staff to address issues with ALA Connect setup. In addition, we are reviewing the BRASS Handbook to update committee charges and ensure that the tips for committee chairs reflect current practices. BRASS also updated the look and feel of the BRASS Business Guides to align it with the new BRASS branding.

Over the course of this year, BRASS committees offered free monthly online discussion groups, two online Publishers' Forums, Lightning Talks and Business Reference in Academic Libraries Online Symposium. We have also planned a strong slate of events for the upcoming ALA Annual Conference 2019 in Washington D.C., including a preconference, a program, discussion group meeting, and several networking opportunities for the members.

Finally, the BRASS Executive Committee conducted a membership survey on their views about the future of BRASS. This survey followed a report on possible options prepared by the Future of BRASS task force. We are looking forward to analyzing the results and discussing them with our members.

CODES

- CODES is known for its book awards, awarding outstanding resources for readers and researchers, including: Notable Books, The Reading List, The Listen List, Outstanding Reference Sources, Dartmouth Medal, Sophie Brody Medal, and The CODES List. CODES announced and celebrated its awards at the RUSA Book & Media Awards (Midwinter) and the Literary Tastes Breakfast (Annual)
- The CODES List is a list of outstanding titles for public library collections, on a selected subject. In 2019, The CODES List debuted with an excellent list of cookbooks
- The Sophie Brody Medal and Notable Books Council updated their committee manuals

- The Readers' Advisory Research & Trends Committee hosted a series of online discussions, and hosted the program at Annual "Give Them What They Want: Reader-Focused Collection Development"
- CODES presents two achievement awards, the Zora Neale Hurston Award and the Louis Shores Award. The Louis Shores Award for excellence in reviewing for libraries was awarded to Donna Seaman. The Zora Neale Hurston Award was not awarded this year.
- The University Press Books for Public and School Libraries, a joint committee with AAUP and AASL will be publishing their annual list after Annual

ETS

- We established the BETA Award. The purpose of the award is to encourage libraries to improve services to their patrons through an innovative use of technology. The RUSA ETS Best Emerging Technology Application Award offers \$3,000 to an individual or group in recognition of a technology application that directly benefits library users. The award is generously co-sponsored by [Chatstaff](#) and [LibraryH3lp](#).
- On February 26, and 27, the ETS Managing Emerging Technologies Committee partnered with the RSS Virtual Reference Services Committee to host an asynchronous e-forum on the "Past, Present, and Future of Virtual Reference & Emerging Technologies." The forum attracted at least sixty-two participants (as judged by responses to a demographic survey) who engaged in discussion about successful virtual reference models beyond chat that they had implemented or were exploring. A highlight of the forum was a guest post from Chris Jimenez, Web Services Librarian at Florida International University, who talked about how he is using Alexa with the LibAnswers FAQ and api for auditory delivery of answers to patrons outside of reference desk hours. A summary of the forum is located at: <https://docs.google.com/document/d/1CBIRXq699LsxAW6Sttwedw9tLsR9DeFb-Ml0GEZmB6U/edit>
- ETS Discovery Committee created a webinar series. Our goal is to host a "preview" webinar (with panelists who will give a sneak peak at what's to come) before Annual and then run the whole series in the next year (2019-20).
- The ETS Tech Showcase committee is organizing a signature event for ALA Annual, "ETS Technology Showcase." The 2019 RUSA Emerging Technologies Showcase will present, in coordination with our esteemed presenters and partners, a wide variety of library technologies currently in use, as well as offer the opportunity for up-close demonstrations and, for some applications, hands-on experience. One of the primary presenters will be the Carroll County Public Library, which offers educational and makerspace technology such as 3D printing (LulzBot Minis), Virtual Reality (HTC Vive, Oculus Rift, & Google Expeditions VR), Augmented Reality (local history AR exhibit, QuiverVision AR coloring sheets, HoloTats AR tattoos), Robotics (Lego WeDo and Mindstorms), Coding with Spheros & Ozobots, Drones (Parrot minidrones & Phantom 4), and more. A few select technologies will be available for hands-on interaction, with the assistance of a professional; while many of the rest will be presented as video demonstrations. The session will also include an academic library speaker, who will address issues involved with implementing makerspace technologies within the university library environment, as well as

best practices for promoting tools for data visualization, STEM education, and more.

Sponsorship for this session is provided by the ACRL Science and Technology Section.

- The ETS User Experience Committee is organizing a series of webinars related to user experience that would be geared toward librarians/staff who may be new to UX principles and don't typically engage with UX as a primary job responsibility.

HISTORY

- Completely revised the Section's bylaws, which had not been amended since 1988. Changes included modernizing the information and language; adding a diversity, equity, access, and inclusion statement; and adding a requirement that the bylaws be completely reviewed at least once every 5 years.
- Held a number of successful events including our regular in-person discussion groups (Local History & Genealogy and History Librarians) at Midwinter 2019 and are planning topics for Annual 2019. During these meetings attendees discussed concerns and current issues in history librarianship.
- Ran its Genealogy Institute at Midwinter 2019, and is in final planning for the Genealogy Pre-Conference at Annual 2019. Both full-day programs are free to participants, thanks sponsored by ProQuest
- Extended our reach to members and potential members using social media
- Began a RUSA HS Weekly Roundup, an email newsletter with articles, job opportunities, and signal boosts that are of interest to Section membership.
- Produced the annual Best Historical Materials List, recognizing both digital and print resources. This year's 12 honorees represented a wide variety of historical fields, periods, and geographical locations, as well as diverse material formats like maps and film.
- Held several virtual discussions for Local History and Genealogy Librarians, or those interested in these topics. These not only allow participation outside of in-person conferences, but also are more informal way to share information and trends, and network with colleagues.
- Presented two awards: The Genealogy / History Achievement Award and the Learning History Research and Innovation Award sponsored by Gale.

RSS

- 2019 ALA Annual Activities:
 - On Sunday, June 23, RSS will hold an Open House and Breakfast, celebrating the 25th anniversary of the Reference Research Forum while also welcoming attendees to join an RSS Committee. The RSS Open House will again be sponsored by EBSCO.
 - On Saturday, June 22, the Library Service to an Aging Population Committee is sponsoring the program "The New Frontier: Hot Topics Engaging Older Adults." It will focus on design concepts for inclusive library programming based on emerging and relevant themes to strengthen engagement with seniors.
 - The Research and Statistics Committee hosts the 25th Reference Research Forum on Monday, June 24, 1-2pm. The two submissions selected for presentation are:

- “What are undergraduate and graduate students’ habits, attitudes, and needs related to research help,” with research by Melissa Miller, Melanee Vicedo, and Elizabeth Galoozis, of the University of Southern California.
 - “How may I teach you? Rethinking virtual reference with the Framework,” is a cross-institutional study by Samantha Kannegiser of Rutgers University-Camden, Julie Hunter of Western Connecticut State University, Jessica Kiebler of Berkeley College - White Plains, and Dina Meky of Berkeley College – Woodbridge.
- On Monday, June 24 from 4-5pm, the Managing, Marketing & Measuring Reference Committee will facilitate the RSS Discussion Group, ““Sound Bites: Current Conversations About Reference,” focusing on the following:
 - Managing Reference Services - What are your concerns?
 - Marketing Reference Services - What works?
 - Measuring Reference - What do we measure and why?
- ETS/RSS Social sponsored by Plunkett Research and Statista will be held at the Morris American Bar on Saturday, June 22,
- Other RSS Committee Activities
 - The Education & Professional Development of Reference Committee created a survey to help determine the content of continuing education, identify disconnects between reference training and local needs, and discover the preferred delivery mode for professional development. The survey was conducted during the month of April, during which time the questionnaire was widely circulated throughout ALA list-servs, ALA Connect and RSS social media. Over 350 surveys were completed. Analysis of the data is happening in Spring 2019.
 - The Library Service to an Aging Population Committee played a key role in contributing to the recent revision of the “Keys to Engaging Older Adults Handbook”, which can be accessed by visiting the ALA Office for Diversity, Literacy and Outreach Services page (<https://bit.ly/2S2sT2A>). Members of the Library Service to an Aging Population Committee will help present a webinar on Tuesday, July 16 at 1 PM (EST), titled, "The New Frontier - Training Older Adults for the Latest Gadgets."
 - The Virtual Reference Services Committee and the Managing of Emerging Technologies Committee of ETS hosted an online discussion of the present state of reference services on February 26 and 27. To view an archive of the two-day conversation, you can view the list-serv “vrc-eforum – ETS Managing Emerging Technologies and RSS Virtual Reference Services Committees E-forum.”
- RSS Ad hoc committees and activities
 - An Ad Hoc Committee was charged to review three committees (the Committee on Multilingual Library Services, the Services for Job Seeking Patrons Committee, and the Health and Medical Reference Committee) and make recommendations about whether these committees should continue.
 - The RSS Executive Committee endorsed the following: sunset all three committees;
 - The RSS Executive Committee endorsed creating a Health and Medical Reference Interest Group, which is now underway.

- The Recognition Committee is reviewing its charge and will make recommendations to re-energize this activity.
- An Ad Hoc Archives and Archivist Committee was appointed and will submit recommendations about managing RSS Archives in 2019/2020.
- The RSS Editor revitalized the RSS Facebook page and began an RSS Twitter account for the Section.

STARS

- STARS has started the process of talking with members about what the section should be and how to both bring value to members and recruit new ones
- Section leadership has started a number of exciting initiatives that will continue into 2019/2020: a rewrite of the bylaws, an online discussion forum to extend the reach of the Interlibrary Loan Discussion Group, and a look at committee effectiveness and opportunities for collaboration.
- The section maintains its two long-time awards, the OCLC-Virginia Boucher Distinguished ILL Librarian Award and the STARS-Atlas Systems Mentoring Award, and also added a new award this year: The Publication Recognition Award. This year, through the generosity of Atlas Systems, two nominees received the STARS-Atlas Systems Mentoring Award and will be attending ALA Annual.
- STARS committees have active projects and research: International ILL conducted its international ILL survey and the ILL community eagerly anticipates the results. Research and Assessment is looking at standardization of resource sharing statistics reporting, and the Interlibrary Loan Committee is drafting competencies for resource sharing practitioners. The Vendor Relations Committee released the results of its scanner survey to share information with the ILL community about popular scanners in use in various operations. Legislation and Licensing finalized its Model License Clause for negotiating licenses with appropriate resource sharing provisions. Outreach and Promotion has done valuable work engaging our members throughout the year.
- The section continues to host the ILL Discussion Group at both ALA Midwinter and Annual. It has proposed online learning opportunities to RUSA and is co-sponsoring an ALCTS program on streaming video at ALA Annual.

Interest Groups (IG)

RUSA now has three highly active Interest Groups: Financial Literacy (FLIG), First Year Experience (FYE), and Shared Collections Interest Group.

Conference Programs

A highlight for RUSA this year is our President's Program on Saturday, June 22 from 4:00 pm – 5:30 pm titled "Inequity and the Disappearance of Reference and User Services." RUSA is also sponsoring 10 programs in addition to the President's Program during the 2019 ALA Annual Conference. Additionally, there will be meetings of the RUSA board, Section boards, committee meetings and discussion groups.

Literary Tastes Breakfast

On Sunday June 23, from 8-10 a.m. we will offer the annual Literary Tastes breakfast program where attendees will hear from some of the year's best authors and enjoy light refreshments. This very popular event is ticketed which helps to defray program expenses.

A complete list of conference programs with dates and times is available [here](#).

Online Courses and Webinars

RUSA Online Learning continues to be a very popular resource with total overall registrations comparing favorably to the strong registration numbers that were posted last year. Completed webinars and courses are the following:

Webinar	Date	Participants
<i>Tools for Locating Primary Sources in Archives & Online</i>	9/6	39
<i>Virtual Video Reference: Connecting with Patrons at a Distance</i>	11/7	52
<i>Getting Started with Open Educational Resources</i>	11/13	34
<i>A Tree Without Roots Cannot Grow</i>	11/27	28
<i>Exploring Local Business and Industry Data</i>	1/15	40
<i>Getting Started on Adult Literacy Programming in your Public Library</i>	2/20	12
<i>Advocacy, Community and Information Literacy</i>	2/22	41
Total		246

Courses	Date	Participants
<i>Marketing the 21st Century Library</i>	9/10	43
<i>Introduction to Lesson Planning for the One Shot</i>	9/24	40
<i>Inside Interlibrary Loan: Basics for a New Millennium</i>	10/1	45
<i>Project Management in Libraries</i>	3/11	30
<i>Who Manages, Who Leads</i>	4/15	23
Total		181

Budget

Below are the RUSA financial results through March.

RUSA Budget FY2019 March	Actual	Budgeted	Variance	FY2018 March
Total revenues	\$149,591	\$240,128	(\$90,537) (-38%)	\$179,275
Total expenses	\$186,473	\$253,775	\$67,302 28%	\$221,693
Net revenue	(\$36,882)	(\$13,647)	(\$23,235) (-170%)	(\$42,418)

Budget Summary

Through 7 months of the fiscal year, RUSA's revenues are below budget by approximately 38%. Expenses however are positive to budget by roughly 28%. RUSA's YTD Net Revenue is -\$36,882. RUSA budgeted for a year-end Net Revenue of -\$42,567. At its current pace of revenue and expense, it is likely that RUSA will exceed its budgeted loss this year.

Compared to this time last year, RUSA is in an overall better financial position by about \$5,000. Revenues are off last year's pace by approximately \$30,000 but expenses are down by approximately \$35,000.

Revenue: Membership revenue continues to be RUSA’s primary revenue source, with revenue YTD of \$94,282. On-line education is the second largest revenue generator for RUSA with YTD revenue of \$43,473.

Expense: All RUSA direct expense accounts continue to show positive variances and will continue to be monitored closely. The largest expense savings occurred in Payroll & Related Expenses, which are ahead \$37,286 YTD or +23%.

Membership

Through March RUSA had 2906 members. RUSA membership has held relatively steady this fiscal year.

RUSA’s overall and individual Section membership is listed below. RUSA’s largest current Section is RSS with 1447 members.

RUSA	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Total Membership	2933	2940	2923	2906	2890	2908	2906

Section Membership

BRASS	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Total Membership	718	712	710	706	693	706	708

CODES	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Total Membership	1153	1160	1158	1148	1156	1160	1159

ETS	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Total Membership	1251	1247	1248	1239	1241	1250	1246

HS	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Total Membership	678	677	674	669	657	654	652

RSS	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Total Membership	1407	1426	1427	1422	1426	1444	1447

STARS	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Total Membership	733	733	733	735	727	742	741

It has been my honor to serve as RUSA President this year.

Ann K. G. Brown
RUSA President 2018-2019