

2010-2011 ALA CD#23.1

2011 ALA Midwinter Meeting

From: Keith Michael Fiels [kfiels@ala.org]
Sent: Thursday, December 30, 2010 12:44 PM
To: ALACOUN
Subject: [alacoun] FW: White paper on the future of Midwinter
Attachments: EBD 12 17 White Paper on the ALA Midwinter 12-29-10x.pdf

Dear Councilors:

A while back, the ALA Board asked us to develop a discussion paper on the future of the Midwinter Meeting.

The combination of technological advances and economic stress has caused many members to question the way in which ALA groups accomplish work. ALA groups have already begun to redefine "participation" and have pioneered new ways of working together. In 2008, Council made critical policy changes that recognize and enable new ways of working together and "meeting".

All these changes have raised questions about the role of the Midwinter Meeting.

The attached "white paper" looks at Midwinter, examines current practices and emerging patterns, and suggests a vision for the future. It is intended to serve as a basis for discussion and suggest some directions for exploration and development.

In looking at both policy and current practice, we do not believe that policy changes – beyond those essential changes already approved by Council – are required in order to support a vibrant, but perhaps very different Midwinter in the future. We do believe that Midwinter must be "repositioned" in our conversation and shared understanding to reflect current - not past - practice and a new understanding of "the business of the Association."

We welcome your thoughts and suggestions...

Keith

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**ALA Executive Board
2011 Midwinter Meeting**

TOPIC: White Paper on the ALA Midwinter Meeting

ACTION REQUESTED: Discussion

REQUESTED BY: Keith Michael Fiels, Executive Director
Mary W. Ghikas, Senior Association Executive Director

DATE: 30 December 2010

BACKGROUND:

Over the past decade, the combination of technological change and economic stress has caused many members to question the way in which ALA groups accomplish work. In particular, they have raised issues related to the continuing viability of the ALA Midwinter Meeting.

At the same time, ALA groups, notably the Task Force on Electronic Member Participation and a variety of groups working in various divisions, have redefined “participation” and have pioneered new ways of working. Following on the report of the TFOEMP, the ALA Council made critical policy changes in 2008 that enable new ways of working.

Both questions and the volume of recent changes suggest that conversation within and among various ALA groups about the Midwinter Meeting would be useful. Based on examination of current practices and emerging patterns, ALA Management has drafted the attached “white paper,” to serve as a basis for discussion and to suggest some directions for future exploration and development.

In looking at both policy and current practice, Management does not believe that policy changes – beyond those critical changes already accomplished by the ALA Council – are required. We do believe, however, that Midwinter must be “repositioned” in our conversation and shared understanding to reflect current, not past, practice and a new understanding of “the business of the Association.”

ALA Midwinter: A Changing Vision

Background

In 1908, ALA began holding an annual business meeting – the Midwinter Meeting – in Chicago. Over the following decades, that meeting expanded steadily in number of registrants and the variety of meetings held.

Since 1966, the Midwinter Meeting has been held in various locations in addition to Chicago. At the same time, exhibits were added. While the primary focus continued to be “for carrying out the business of the Association”, a “limited number of program meetings, institutes, conferences, or workshops” began to be offered.

Over the last thirty years, attendance has grown steadily: In 1980, 4,000 people attended the Midwinter meeting; by 2008, that figure was over 13,000. Of those attending, approximately one third on average are attendees from the immediate region.

Pre-Midwinter Institutes have been offered in conjunction with the ALA Midwinter Meeting for a decade. In the recent past, the Meeting has been characterized by a rich, and growing, array of discussion groups, interest groups and other “communities of interest.” Approximately 200 such groups currently convene. Since 2007, a Sunrise Speaker Series, authorized according to policy by the ALA Executive Board, has provided first-time and regional attendees with a “taste” of the Annual Conference experience.

New challenges in a changing environment

The advent of new communication technologies and the present economic downturn have challenged our assumptions about almost everything. This has been particularly true of Midwinter.

On one hand, the Internet, email, social networking and virtual meeting spaces have made it possible for much of the business of the Association’s governing bodies and committees to be conducted “virtually”. This has raised the broader question of the role and value of face-to-face meetings in an environment where more and more business can be conducted virtually.

At the same time, the current recession has made it much more difficult for those involved in the association to travel, as funding for institutional support has been reduced or eliminated. This has made it harder for members to travel to meetings in person.

There is no question that the current recession and changes that are occurring in the nature of communication due to new technologies are going to affect the Midwinter Meeting. All agree that we need to look critically at our current policies and the purpose of the meeting, in order to make sure it continues to serve the Association and its members.

The Present: What Does the 2011 ALA Midwinter Meeting Look Like?

The 2011 Midwinter Meeting includes approximately 1,000 separately-scheduled events by ALA, ALA units and ALA affiliates – plus another 184 events scheduled by “unaffiliated” groups (e.g. vendors, unaffiliated organizations). This represents a reduction from the peak Midwinter meetings of several years ago. This smaller number of meetings and other events is attributable to (a) the increased scheduling of “all committee” or “all task force” sessions (counted now as a single meeting) and (b) a shift of some groups from face-to-face to digital/virtual meetings.

Of the approximately 1,000 separately-scheduled events, three-fourths are meetings –including governance (e.g. ALA Council, ALA Executive Board, Division Boards, etc.), intergroup meetings (e.g. USBBY), special project meetings, and pre-conferences, as well as a wide array of committees, subcommittees, and other working groups. A substantial subset of Midwinter “business” meetings is the array of book/media award juries which make their final decisions in face-to-face meetings at Midwinter. These juries often use sole-purpose or dedicated rooms and have displays of books/media available for the committee - and often for other interested attendees.

The other quarter may be roughly categorized as follows:

1. “Membership” Meetings. While there is no official ALA membership meeting at Midwinter, portions of membership are choosing to meet. In some cases (e.g. ACRL-LES, ERT, FAFLRT, GODORT) it is clearly labeled a membership meeting. In other cases, the focus is a “topic-based” discussion specifically for group members (e.g. ALCTS-CCS, ASCLA-LSSPS, ACRL-WESS), often combined with a “business meeting.” Midwinter is also an important meeting time for representatives of organizations affiliated with ALA or some of its units (e.g. AASL Affiliate Assembly, ALA Chapter Forum, ALCTS Council of Regional Groups Membership Meeting).
2. Updates or Forums. The Midwinter “Forum” or “Update” is increasingly an opportunity to provide information on new developments, new research, new legislation, new initiatives or new grant opportunities – and to hear members’ related concerns, questions, recommendations and advice. The list of identifiable “Forums” for updates on and discussion of particular issues is growing. The model varies somewhat from forum-to-forum, with the Washington Office Update serving as an early and notable model, while other “forums” more closely resemble a discussion group. The 2011 ALA Midwinter Meeting includes almost thirty such updates, including the following:
 - The ALA Washington Office will bring experts together for a post-election analysis and discussion of how the results will impact libraries.
 - The ACRL/SPARC Forum – a regular feature of recent Midwinters – will focus on the latest issues in scholarly publishing.
 - ALA’s Committee on Literacy will sponsor a forum on e-readers and literacy.
 - PLA’s Management of Electronic Reference Services Discussion Forum will focus on assessment and evaluation of virtual reference.
 - The findings of ACRL’s “Futures Thinking for Academic Libraries: Higher Education in 2025” will be the topic at the ACRL Forum.
 - Attendees can comment on the ongoing revision of NLS Standards at the NLS Standards Revision Open Forum, sponsored by ASCLA.
 - With RDA on the horizon, ALCTS will sponsor “News from the Front: Briefings from RDA test participants.”
 - Representatives of the National Library of Education and ERIC will update users on recent changes and future plans at the ERIC Update.

- The ALA International Relations Committee will hold a “Traditional Cultural Expressions Open Forum.”
 - RUSA-RSS has a “discussion forum” with the topic “When we create a learning commons, how does it change reference services?”
3. “Communities of Practice” (Discussion Groups/Interest Groups/Member Initiative Groups). The array of discussion groups is broad – and provides an interesting and useful window into the ways in which members choose to organize themselves. The 2011 Midwinter Meeting includes approximately 150 scheduled “discussion opportunities” – discussion groups, interest groups, member initiative groups, forums, membership meetings, and other groups in which members come together to discuss late-breaking developments in various specialized areas, to share ideas, and to encourage and challenge one another. The following sample suggests the range and diversity of these discussions:
- Balancing Books and Babies (ACRL)
 - Mobile Computing Interest Group (LITA)
 - Sociology Librarians Discussion Group (ACRL-ANSS)
 - Scholarly Communications Discussion Group (ALCTS)
 - Diversity Officers Discussion Group (LLAMA)
 - Creative Ideas in Technical Services Discussion Group (ALCTS)
 - Popular Cultures and Libraries Discussion Group (ACRL)
 - Collaborative Digitization Discussion Group (ASCLA-ICAN)
 - Games and Gaming Member Initiative Group (ALA)
 - Public Libraries Technology Interest Group (PLA)
 - Serving Young Adults in Large Urban Populations Discussion Group (YALSA)
 - Library Interiors Discussion Group (LLAMA-BES)
 - Storytelling Discussion Group (ALSC)

Almost every Midwinter Meeting sees the addition of at least one new discussion group. At the San Diego meeting, LITA’s new Transliteracy Interest Group will hold its first meeting.

Additionally, many ALA groups sponsor discussion and networking opportunities aimed specifically at new members or potential members. These range from a New Members Discussion Group (e.g. ACRL, ACRL-LES, ALCTS), to NMRT’s Membership, Networking & Committee Interest Meeting, to LITA’s “201” session, to ALCTS’ Competencies and Education for a Career in Cataloging Interest Group, with its focus on career directions.

The ALA Midwinter Meeting includes exhibits, as it has since the mid-sixties. While the Midwinter Exhibits have grown, they remain – and are likely to remain – smaller than the Annual Conference exhibits. For many exhibitors, however, the somewhat smaller exhibit floor, the smaller number of competing attractions and an attendance that includes many experienced, active members make the Midwinter Meeting particularly attractive.

Of particular importance are the announcements at Midwinter of the Youth Media Awards. More than twenty awards are announced by ALSC, YALSA, EMIERT, GLBT RT, REFORMA and others in a press conference attended by hundreds and viewed online by many thousands. These awards represent one of the Association’s most high profile events of the year, followed by publishers, booksellers educators and the public at large.

Since the advent of the recession, there has been an increased emphasis at Midwinter on career development and employment assistance for the many librarians looking for jobs in a tough economy. Professional counselors and volunteer mentors provide assistance in resume review and career planning. This is especially valuable for the many new and younger members - often from the immediate area -who attend.

At this point, advance registration for the 2011 Midwinter Meeting in San Diego is projected to be only slightly less than that for the 2010 meeting in Boston, which is consistent with past experience with the sites. Overall, Midwinter attendance is down about 15% in relation to attendance levels prior to the beginning of the current recession in November 2007.

Why Midwinter?

So what are the functions that Midwinter fulfills in addition to committee work that are critical to the vitality of the Association, the profession, libraries and our societal mission?

Reaching out and engaging members

Each ALA conference – including the ALA Midwinter Meeting – reaches a unique audience. Between 25 and 40% of the attendance at a conference is “regional.” Many members attend a conference when they can – when they can drive or train in, when it is easier to fit it into their family and work life, and when they can stay at home or be away from home for a shorter period. ALA has, for that reason, continued to move to various regions around the country.

The ALA Midwinter Meeting plays a particularly important role for ALA because it is can be held in cities that will no longer hold the much larger ALA Annual Conference, with its full complement of programs and special events. The ALA Annual Conference and the ALA Midwinter Meeting – together with the three Division National Conferences (AASL, ACRL, PLA) and national forums or institutes (e.g. ALSC, LITA, YALSA) – provide ALA with strong “reach” in the library community in all regions and make ALA face-to-face networking and learning more accessible to members.

Recruitment

Midwinter also attracts many regional attendees who are non-members, and a substantial portion of registrations are always “join and save” registrations (non members who join for discounted registration and in many instances may not renew). This presents a unique opportunity to engage and retain these non members, both through the meeting itself and through follow up communications.

Discussion and Decision

The ALA Midwinter Meeting is deeply integrated into and integral to the life of the Association. It is a critical meeting time for the ALA Council and Executive Board, for Division Boards and for key committees which, while doing increasing work “virtually” between meetings, still rely heavily on face-to-face meetings to discuss sensitive issues, make high-stakes award decisions and resolve inter-group differences. The smaller “campus” makes it possible for the many groups gathered together to move cooperative projects and negotiations along much more quickly than would be otherwise possible. The smaller crowds, lack of programs and overall fewer distractions create an environment for in-depth planning and discussion that cannot be achieved at Annual Conference. Given increasing demands for

attention driven by the growth in virtual and electronic communications, the value of effective face to face networking and interaction has increased, not decreased.

Professional Development and Emerging Issues

Lacking the wide array of contributed programming and the many special events -- e.g. the Scholarship Bash, the Newbery-Caldecott Banquet -- of Annual Conference, the Midwinter Meeting has increasingly become a venue for highly participative conversation around professional issues. There has been notably little pressure to develop the kind of program proposal process required for the 200-250 programs presented by various ALA and related groups at Annual Conference. Rather, member creativity has focused on development of new conversation venues – discussion groups, interest groups, member initiative groups – that are less structured and that, by their nature, are hospitable to focus on breaking news, on current issues, on informal sharing. These venues often provide more immediate opportunities for engagement and participation for younger and newer members.

Networking Opportunities

Midwinter also provides opportunities for members to interact with leaders in the field, to network professionally, and to gain leadership experience. Library vendors serving the library community find the meeting an opportunity to hold in depth discussions with potential clients and to prototype new products in a less distracting environment than that of Annual Conference. Attendees who may know each other only through social networking or virtual work can hold face to face gatherings, both formal and informal. More face to face interaction with experts is also possible.

A “hub” for library related groups and the library community

The Midwinter meeting serves as a focus of activity for many other groups that use the conference as a venue for related activities. These include ALISE, ULC, the Ethnic Caucuses, and vendors such as OCLC. Many offer continuing education opportunities (e.g. Simmons College is offering a one-day face to face seminar for students participating in a hybrid course on Fundraising and Entrepreneurial Enterprises). The gathering of such a large group of individuals provides a cost effective opportunity for many organizations sponsoring meetings that might otherwise be unsustainable as stand-alone events.

A Key Component of the Book/Media Award Cycle

The Midwinter Meeting is integrated into the book/media award cycle. Juries finish their difficult – and sometimes contentious – decision process in face-to-face meetings at Midwinter. Interaction between the library and book community – particularly in the area of books for children and youth – is intense, with the early morning press conference and other announcements leading to high-profile acceptance events (such as the Newbery-Caldecott Banquet) at Annual Conference.

Sustaining energy, enthusiasm and momentum

The primary goal of the Association is the “promotion, development and improvement of library and information services and the profession of librarianship”. Coordinating and sustaining the efforts and initiatives of a national association where the majority of energy comes from perhaps 5,000 active member volunteers spread across the country is not a simple task. Midwinter provides an opportunity to regroup, reinvent and recharge for those whose efforts span thousands of miles and thousands of individual

libraries. This is particularly true of advocacy efforts and complex projects involving many individuals and many units.

Member Interest

Ultimately, members “vote with their feet” – and Midwinter attendance has held up remarkably well. Until the economic crisis, Midwinter was growing more quickly than Annual.

The Future of Midwinter

Attendance at Midwinter has steadily increased over the last two decades, suggesting that a significant number of members have found the meeting to be valuable. While the recession has impacted this and will certainly continue to impact it in the future, over 11,000 chose to participate at the last Midwinter meeting in Boston.

Many of the questions raised about Midwinter have to do with the continuing belief that individuals are required to attend Midwinter in order to participate on committees. In fact, there is no policy that requires a group to meet at Midwinter - or requires any group to meet in-person at all. The policy defining “participation” (4.5: *Requirements for Committee Service*) was changed by the ALA Council following the recommendation of the Task Force on Electronic Member Participation in 2008. No member accepting an appointment has to commit to face-to-face meetings unless it is a specific requirement based on the nature of the committee’s work. For division and round table committees, that decision is appropriately made by the executive body of the division or round table, in consultation with the individual group. For ALA committees, the ALA Committee on Organization is considering how to approach that question, in consultation with individual committees, in order to make appropriate recommendations to Council. The decision as to whether or not groups will schedule specific meetings at Midwinter rests with individual groups and the bodies that authorize them.

Another misconception is that the Midwinter Meeting consists solely of committee meetings. In reality, many forums, discussion groups and other in-person interactions advance the mission of the Association by permitting and encouraging in- depth discussions and interactions between ALA members. Midwinter also provides opportunities for members to interact with leaders in the field, to network professionally, to be mentored, and to gain leadership experience; many divisions, such as LLAMA, integrate regular leadership development into their Midwinter work. It also offers hundreds of discussion groups and a more distraction-free environment than Annual for conversations with vendors. Because between a quarter and a half of the attendees are typically regional, many members who might not be able to travel nationally are being provided with an opportunity to become involved in the Association.

The advent of sophisticated electronic communication technologies provides us with the opportunity to spend less time on bureaucratic and procedural matters and more time focusing on strategic issues facing libraries and the Association. That means much of our past business can – and should be - conducted virtually.

The 2011 Midwinter does seem to show this trend playing out. Over the past few years, there have increasingly been groups that decided not to meet at Midwinter, and that pattern is expected to continue. The 2011 Midwinter is noticeably down in terms of numbers of “separately-scheduled events.” We’re at about 1,000 this year – considerably down from the 2,000 events in 2008. At the same time, we’re seeing attendance remain stable, and a noticeable growth in the number and variety of forums for discussion of advertised topics, often with designated content leaders/facilitators/speakers.

Given the present pace of change and the challenges we face, we must question whether in-person meetings once a year would best serve the Association and libraries. Would it sustain our membership and develop the next generation of leadership? Many committees may be able to function as effectively - or more effectively - than they do now without any face-to-face meetings, but this has not universally proven to be the case so far. In a fiercely competitive environment, where other competing interests and entities continue to use face to face meetings to inspire members and support decision-making based on deep discussion, the Midwinter face-to-face meeting helps keep the Association focused and strong.

The reality is that members are quietly creating a Midwinter that works for them. There is little or no pressure from divisions/round tables to have “programs” at Midwinter; no one wants the work and process required for such events at Midwinter. They do, however, seem to continue to want information forums – as well as discussion group kinds of activities – that operate on shorter lead times, with less bureaucracy and less process. Midwinter is much more conducive to spontaneity and to quickly responding to changes in the environment, late-breaking opportunities and challenges. ALA Units and their member leaders are to be commended for the many changes that they have made and are continuing to make in the Midwinter Meeting.

While we do not believe that any policy change is required, beyond the redefinition of “participation” already accomplished by the ALA Council, Midwinter does need to be formally “repositioned” in our communications with members as face-to-face committee meetings no longer serve as its sole purpose. Other changes that would make Midwinter more effective and which are already being aggressively pursued are:

- More “hybrid” meetings combining in-person and virtual participation and extending the conversation beyond the immediate in-person attendees;
- A greater visibility for the informal discussion groups that have flourished for at least two decades;
- A greater emphasis on regional continuing education programs and pre-conferences;
- More leadership and career development opportunities, such as those already offered by divisions and by NMRT; and,
- More participatory and interactive sessions.

Given the many ways in which Midwinter still supports the mission and goals of the Association, it is clear that a Midwinter Meeting, albeit “transformed,” is in the best interest of the Association - and the libraries we serve.

Ultimately, our future Midwinter might be a smaller Midwinter. Sheer growth is not necessarily always desirable, and Midwinter would lose many of the advantages cited if it were to grow into another conference with 25,000 attendees. Midwinter has been of value to the organization since it was a gathering of a dozen individuals. With prudent planning and an understanding that we will need to “reinvent” Midwinter as our environment changes, it can continue to be of value for many years to come.

Vision: The Midwinter Meeting

The ALA Midwinter Meeting includes core governance activities such as meetings of the ALA Council and various Boards, as well as many committees. It also includes orientation activities; exhibits; a wide array of discussion and interest groups, as well as other networking activities; and, formal updates or forums which provide an opportunity to both update members on legislative issues, research and other matters and to hear

member input on ALA positions and actions. There are also Pre/Post-Midwinter Institutes – regional educational events attached to the Midwinter Meeting. Numerous other library-related groups hold meetings and educational events in conjunction with the Midwinter Meeting, allowing participants to make most effective use of precious travel funds. The ALA Midwinter Meeting is, above all, about conversations and networking.

Keith Michael Fiels, Executive Director
Mary W. Ghikas, Senior Associate Executive Director
American Library Association
29 December 2010

Appendix: Midwinter Attendance: 1980-2010

Attendance - Midwinter

