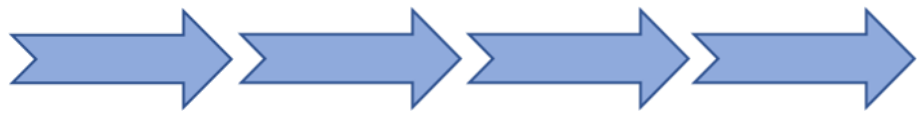


The Path to Transformation



ALA American
Library
Association

Pivot Strategy
2021 – 2025

Key Pivot Points:

- Increased Alignment
- Increased Membership
- Increased Revenue

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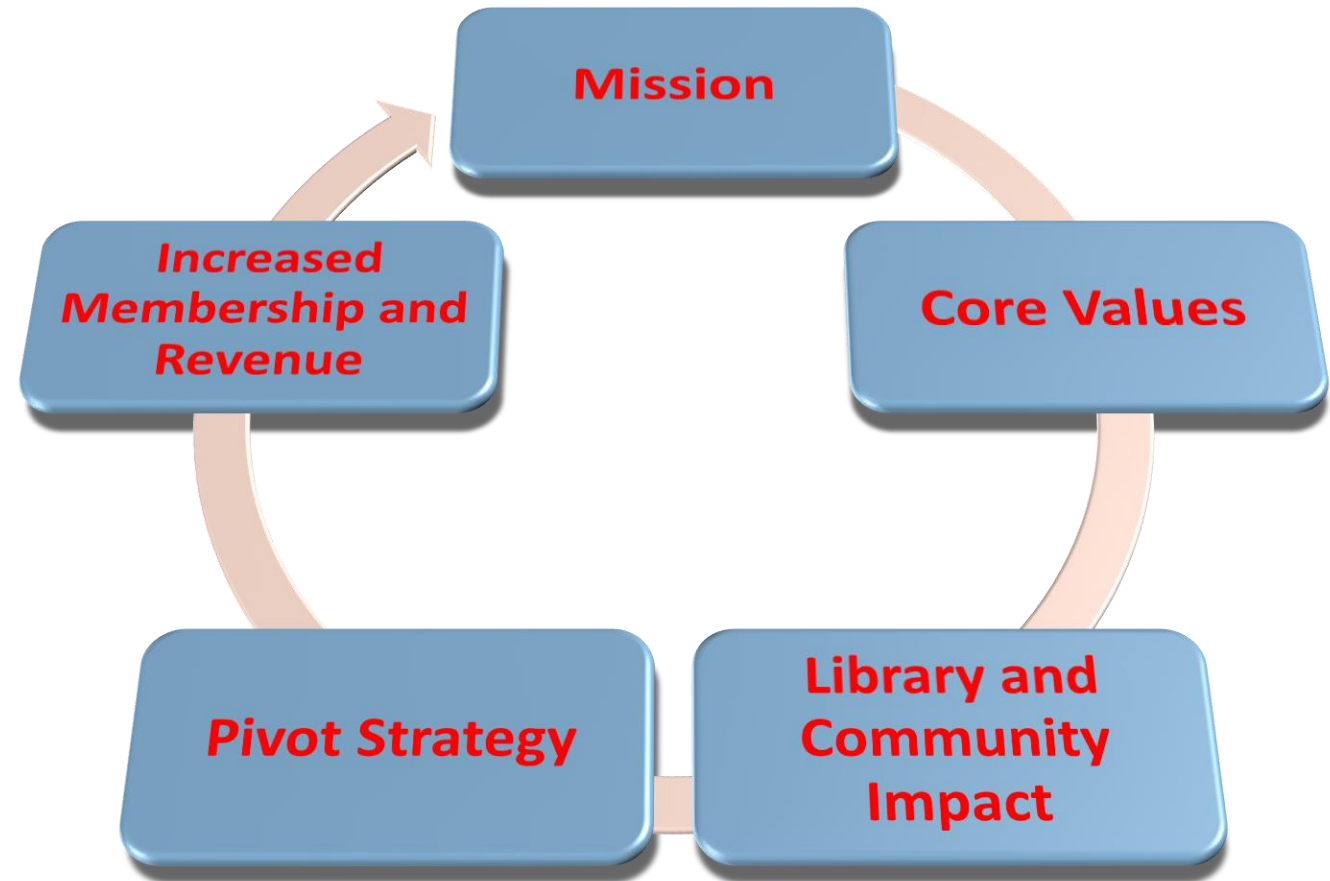
Stronger Association Stronger Libraries



Facing Change at Every Level

- **Forward Together** (Association Governance)
- **Operating Agreement** (Functional Governance)
- **Pivot Strategy** (Performance Governance)

A Cyclical Relationship



Turning Mission into Impact

I. ALA Mission

II. ALA Core Values (Emphasizing Diversity and Inclusion)

III. Library and Community Change: Reach, Mobility, Resilience, and Social Justice:

- Information and Digital Access (including Universal Broadband);
- Equity, Diversity, and Inclusion in Libraries and the LIS Workforce; and
- Preservation of Library Services (across library types and services)

IV. *ALA Pivot Strategy: The Pathway to Transformation*

Overarching Goals:

- Increase Alignment Across Six Impact Streams by 2025: Conference and Events; Continuing Education; Contributed Revenue; Data and Research; Membership; and Publishing
 - General tactical Goals; Cross Functional Goals; Unit Goals
- Increase Membership by 5% by 2025
- Increase Revenue annually by 10% over expenses by 2025

V. Tangible Impact

ALA MISSION

The **mission** of the American Library Association is to provide leadership for the development, promotion, and improvement of library and information services and the profession of librarianship in order to enhance learning and ensure access to information for all.

CORE VALUES

- Access
- Confidentiality/Privacy
- Democracy
- Diversity
- Education/Lifelong Learning
- Intellectual Freedom
- The Public Good
- Preservation
- Professionalism
- Service
- Social Responsibility
- Sustainability

Creating Library and Community Change

Expanding Reach, Mobility, Resilience, and Social Justice through:

- Information and Digital Access (including Universal Broadband);
- Equity, Diversity, and Inclusion in Libraries and the LIS Workforce;
- And Preservation of Library Services (across library types, settings, and services)

ALA Pivot Strategy:

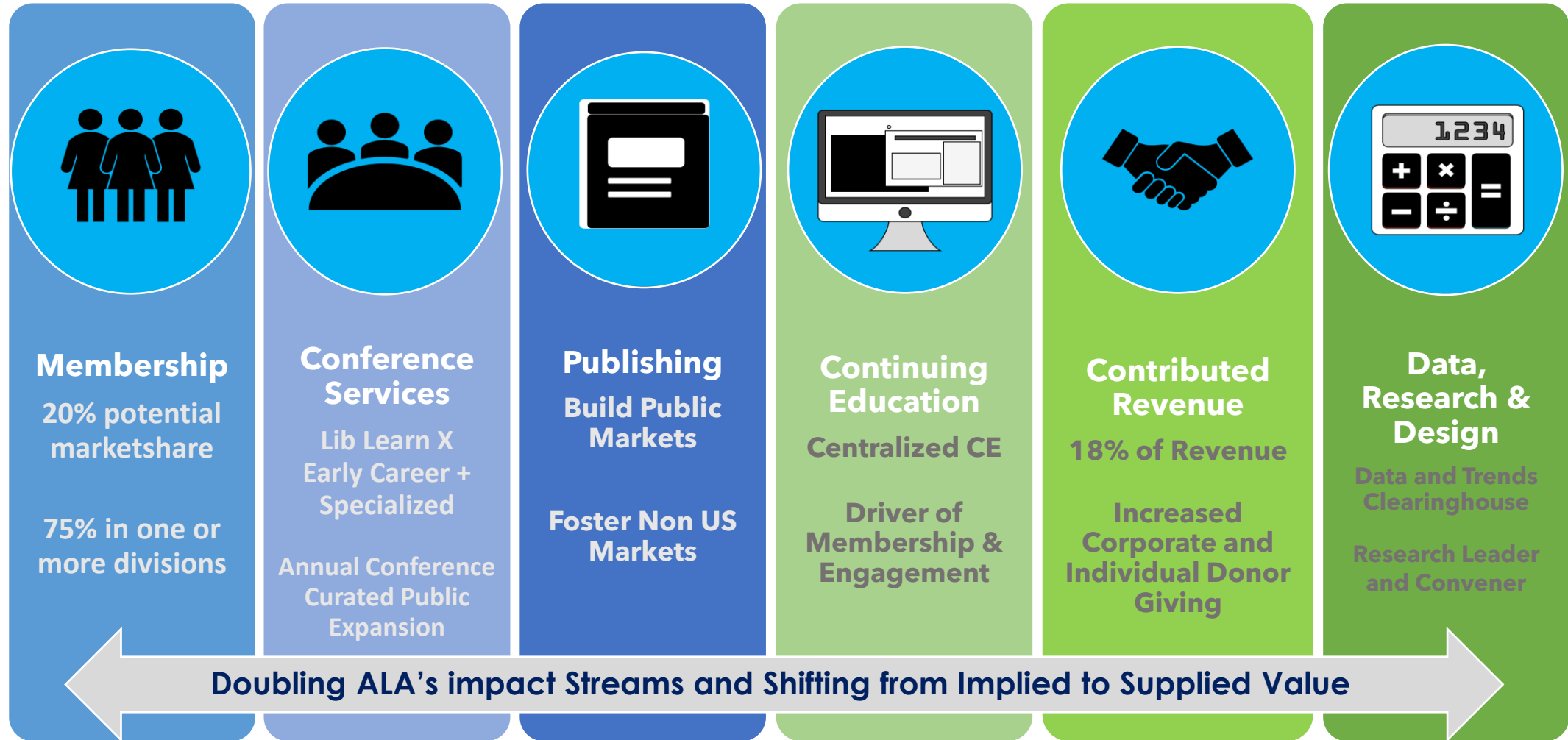
The Pathway to Transformation

Overarching Goals:

- Increase Alignment Across Six Impact Streams by 2025:
Conference and Events; Continuing Education; Contributed Revenue; Data and Research; Membership; and Publishing
 - General tactical Goals
 - Cross Functional Goals
 - Unit Goals

Two Major Association-wide Goals:

1. Increase Revenue by 10% over expenses;
2. Increase Membership by 5%



Audience/Revenue
Expansion

Increase Alignment Across Six Impact Streams by 2025

Tactical Goals

FY 21	FY 22	FY 23	FY 24	FY 25
<ul style="list-style-type: none"> • \$: Neg rev/exp gap • CR\$: 6% (\$2M) from Dev • Mem: 15% Marketshare • Rev Strms: 3 (Conf, Mem, Pub) • Specific GF Units \$ generating • Div: 8 with 65% of Mem • Confs: 2 • Culture: "Big" ALA + Div • Decentralized CE, COMMS, Dev, Purchasing • Mitigate IT as a cost center • Move to centralized teams for greater staff productivity and coordination • ASAE/Association Forum benchmarking exercise • Aligning for impact/elimination of redundancy 	<ul style="list-style-type: none"> • \$: Neu rev/exp gap • CR\$: 10% (focus ind giv + fdn) • Mem: 15% Marketshare • Rev Strms: 5 (CE, Con \$, Conf, Mem, Pub + Non-US markets) • All GF Units tracked to \$ generating • Div: 8 with 65% of Mem • Conf: 1 • LibLearnX Event • Culture: One ALA • Centralizing CE, COMMS, Dev, Purchasing • IT realigned and driver of revenue • ALA aligning to ASAE/Assn industry standards • Testing public markets for internal products (printing. Booklist, etc.) 	<ul style="list-style-type: none"> • \$: Neu rev/exp gap • CR\$: 12% (focus ind giv + fdn) • Mem: 18% Marketshare • Rev Strms: 6 (CE, Con \$, Conf, Mem, Pub + Non-US markets, Data services) • All GF Units tracked to \$ generating • Div: 8 with 68% of Mem • Conf: 1 • LibLearnX Event • Culture: One ALA • Centralized CE, COMMS, Dev, Purchasing • IT realigned and driver of revenue • ALA aligned to ASAE/Assn industry standards • Testing public markets for internal products • Testing Public facing Annual Conference 	<ul style="list-style-type: none"> • \$: Pos rev/exp gap • CR\$: 15% (add corp) • Mem: 18% Marketshare • Rev Strms: 6 (CE, Con \$, Conf, Mem, Pub + Non-US markets, Data services) • All GF Units tracked to \$ generating • Div: 8 with 75% of Mem • Conf: 1 • LibLearnX Event • Centralized CE, COMMS, Dev, Purchasing • IT realigned and driver of revenue • Testing public markets for internal products • Pub facing Annual Conference • Overall Non-US Market Expansion for products and services 	<ul style="list-style-type: none"> • \$: Pos rev/exp gap • CR\$: 18% (add corp) • Mem: 20% Marketshare • Rev Strms: 6 (CE, Con \$, Conf, Mem, Pub + Non US, Data services) • All GF Units tracked to \$ generating • Div: 8 with 75% of Mem • Main Conf: 1 • LibLearnX Event • Centralized CE, COMMS, Dev, Purchasing • IT realigned and driver of revenue • Testing public markets for internal products • Pub facing Annual Conference • Overall Non-US Market Expansion for products and services • Testing 7th Revenue Stream

Key: \$ = Budget; CR\$ = Contributed Revenue; Mem = Membership; Rev Strms: Revenue Streams; GE = General Fund;

Financial Alignment

In the Pivot Strategy
Approach to Alignment
all Units track to
Membership and
Revenue Generation



FY22 Budget Objectives

- Align expenditures with revenues
- Increase revenue sources
- Develop budget surplus
- Focus on financial stability
- Develop new budget metrics

Facilitating Changes: Move from “Expense-based” to “Revenue-based” budget; Planning against three (high, mid, low) budget scenarios; Recalibration of fixed expenses to revenue model rather than “planned loss”.

Examples of Cross Functional Teams

1. Awards
2. Communications
3. Conference Services
4. Continuing Education
5. Data, Design, and Research
6. External Relationship Management
7. Governance
8. Grants and Sponsorship
9. IT
10. Membership
11. Program Assessment
12. Professional Development
13. Publishing
14. Staffing Synergies and Productivity
15. Strategy and Performance Management

Data, Research, and Design (Unit and Team)

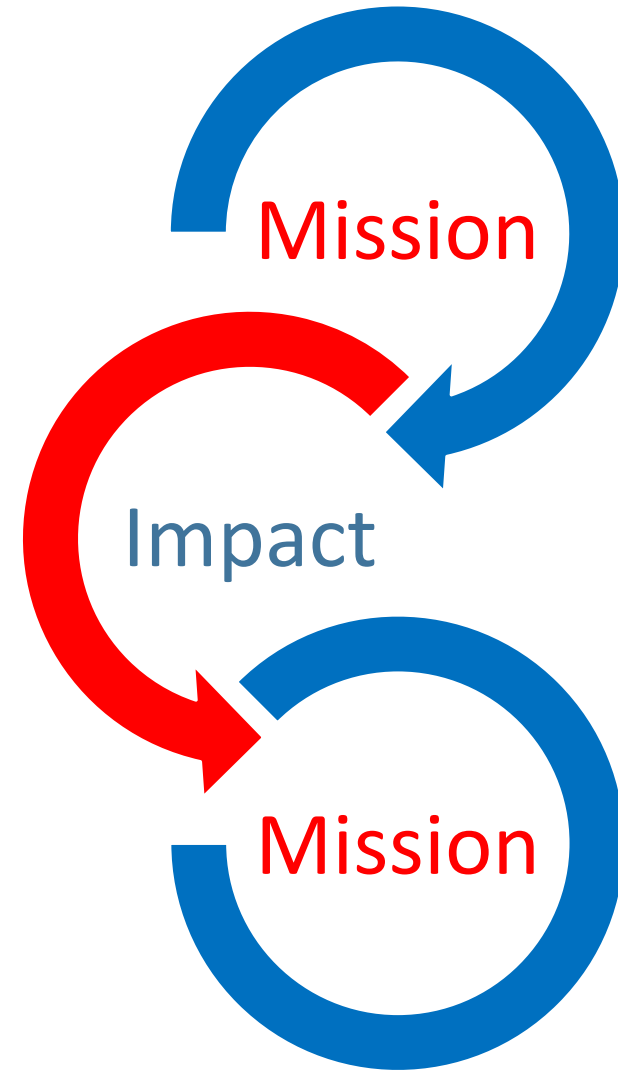
- Establish ALA as a trusted source for current statistics, metrics, research, and trends by creating a research office with staff expertise in data management, research methodologies, and analysis.
- Position ALA as the leader in developing a national research agenda for the profession, as a respected convener of productive dialogue around critical or issues and establish a presence in federal and international library data and research initiatives.
- Invest in a robust database platform to manage member, donor, and customer relationships through systematic and ongoing internal research.

Two Driving and Connected Goals

- Increase Membership by 5% by 2025
- Increase Revenue annually by 10% over expenses by 2025

**Tangible
Impact**

**Our Impact
Must Flow from
Our Mission
and Drive it**



Questions ?

