

TO: LITA Board of Directors

TOPIC: LITA FORUM ASSESSMENT TASK FORCE

ACTION / INFORMATION / REPORT: REPORT

ACTION REQUESTED BY: JENNY EMANUEL TAYLOR & KEN VARNUM, CO-CHAIRS

SUBMITTED: JANUARY 13, 2017

SUMMARY

Over the course of 2016, the Forum Assessment Task Force explored the impact and perceptions of the LITA Forum among LITA members and library technologists in general. The Task Force combined existing data already gathered from surveys, as well as conducted its own survey, a matrix mapping exercise, and a series of focus groups, to understand how the LITA Forum is perceived, identify strengths and weaknesses, and make recommendations for the Forum's continued success.

BACKGROUND

The LITA Forum is a well-established library technology conference. The LITA membership and attendees (not necessarily the same categories of people) have some knowledge of the annual event and a basic understanding of what it is. The key characteristics of the Forum that should be preserved over the long term include:

- The relatively small size
- The Forum's focus on networking and allowing time for conversations and collaborations to develop outside the actual conference program
- The Forum's emphasis on trends for the future, through which attendees can learn about new things coming, rather than exclusively about case studies of where other libraries have been

ACTION REQUESTED

We make many recommendations, detailed in the "Recommendations" sections below.

Major features of Forum need to have guidelines to planning and extensive documentation

Involve public librarians & reach out to them as central participants in the Forum

- Examine outsourcing conference logistics and support
- Conference length should be two full days, on a Friday and Saturday
- Develop an attendee mentor program
- Make some subcommittees permanently a part of the Forum planning committee
- LITA staff work to improve relationships with vendors
- Investigate having Forum rotate among a small number of cities
- Investigate and implement more virtual keynotes and/or presentations
- Develop conference topics early, have specific tracks
- Make changes to presentations to vary the formats, ensure good speakers/presentations, and have them include more interaction
- Have up to half of presentations be invited
- Reduce the number of keynotes

Forum Assessment Task Force

Final Report

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Table of Contents

CHARGE	7
EXECUTIVE SUMMARY	9
METHODS	11
DATA	11
<i>Examination of LITA Membership</i>	11
<i>Demographics of LITA Forum Attendees, 2011 – 2015</i>	11
<i>Comparisons between LITA Membership and LITA Forum Attendees</i>	11
<i>Survey</i>	11
<i>Analysis of library technology conferences</i>	12
<i>Matrix Mapping</i>	12
<i>Focus Groups</i>	12
INTERESTING INSIGHTS	13
<i>LITA Membership</i>	13
<i>LITA Forum Attendees</i>	13
<i>Comparison between Membership & Attendees</i>	13
<i>Survey</i>	13
<i>Conference Comparison</i>	14
<i>Matrix Mapping</i>	14
<i>Focus Groups</i>	14
<i>Conclusions</i>	15
RECOMMENDATIONS	16
1. IDENTITY	16
a. <i>Identity</i>	16
b. <i>Audience</i>	16
2. NAME	16
a. <i>New Name</i>	16
3. OVERALL	16
a. <i>Guidelines</i>	16

b.	<i>Documentation</i>	17
c.	<i>Public Librarians</i>	17
4.	LOGISTICS	17
a.	<i>Outsourcing Logistics</i>	17
b.	<i>Forum Structure</i>	18
c.	<i>Days of the Week</i>	18
d.	<i>Planning Committee Subcommittees</i>	18
e.	<i>Bundle Membership/Forum</i>	19
f.	<i>Mentor Program</i>	19
5.	LOCATION.....	19
a.	<i>Fewer Locations</i>	19
b.	<i>Location Characteristics</i>	19
6.	VENDOR RELATIONS.....	20
a.	<i>LITA Staff and Vendor Relationships</i>	20
b.	<i>Conference Prospectus</i>	20
c.	<i>Attendee List</i>	20
d.	<i>List of Sponsorship Opportunities</i>	21
e.	<i>Planning Time</i>	21
f.	<i>Conference Participation</i>	21
7.	VIRTUAL ASPECTS.....	21
a.	<i>Virtual Conference</i>	22
b.	<i>Streaming/Recording Presentations</i>	22
c.	<i>Offer Popular Presentations as Webinars</i>	22
8.	TOPICS & TRACKS.....	22
a.	<i>Conference Theme</i>	23
b.	<i>Topics</i>	23
c.	<i>Conference Tracks</i>	23
9.	PRESENTATIONS	24
a.	<i>Inviting Presenters</i>	24
b.	<i>Hands-On</i>	24
c.	<i>Invite LITA Authors/Educators</i>	24

d.	<i>Panel Discussions</i>	24
e.	<i>Webinar on how to Propose and Present</i>	24
f.	<i>Presentation Quality</i>	25
g.	<i>Speaker Liaisons</i>	25
h.	<i>Topic Voting</i>	25
i.	<i>Lightning Talks</i>	26
j.	<i>Birds of a Feather Sessions</i>	26
k.	<i>Poster Sessions</i>	27
l.	<i>Presentation Length</i>	27
m.	<i>Pre/Post Conferences</i>	27
10.	KEYNOTES	27
a.	<i>Number of Keynotes</i>	27
b.	<i>Attendee Participation</i>	28
c.	<i>Keynote Topics</i>	28
	APPENDIX A – EXAMINATION OF LITA MEMBERSHIP	29
	APPENDIX B – DEMOGRAPHICS OF LITA FORUM ATTENDEES, 2011 – 2015	34
	APPENDIX C – COMPARISONS BETWEEN LITA MEMBERSHIP AND LITA FORUM ATTENDEES	38
	APPENDIX D – SURVEY	43
	APPENDIX E – ANALYSIS OF LIBRARY TECHNOLOGY CONFERENCES	54
	APPENDIX F – MATRIX MAPPING	57
	APPENDIX G – FOCUS GROUPS	66

Charge

<http://connect.ala.org/node/246346>

The LITA Board charges the Forum Assessment & Alternatives Task Force with assessing the impact of LITA Forum; evaluating its position within the library technology conference landscape; and recommending next steps. The goal of this work is to ensure that the time and resources spent on Forum are highly beneficial to both the membership and the division. The Task Force is welcome to consider both incremental and transformational changes.

Deliverables

A report to the LITA Board which covers:

- The impact of Forum, following the criteria determined by the Board as part of its matrix mapping process (<http://connect.ala.org/node/238204>)
- An environmental scan of library technology conferences
- Recommendations as to how Forum should distinguish itself and increase its
- impact within that environment

Timeline

The Task Force will commence by Midwinter 2016 and run through Midwinter of 2017. It will present a preliminary report for feedback no later than two weeks before Annual 2016, and submit its final report at least two weeks in advance of Midwinter 2017.

Composition

The Task Force will contain approximately seven members, including representation from or liaisons to the following LITA committees:

- Membership
- Assessment

- Forum Planning 2016

Budget

None.

Executive Summary

Over the course of 2016, the Forum Assessment Task Force explored the impact and perceptions of the LITA Forum among LITA members and library technologists in general. The Task Force combined existing data already gathered from surveys, as well as conducted its own survey, a matrix mapping exercise, and a series of focus groups, to understand how the LITA Forum is perceived, identify strengths and weaknesses, and make recommendations for the Forum's continued success.

The LITA Forum is a well-established library technology conference. The LITA membership and attendees (not necessarily the same categories of people) have some knowledge of the annual event and a basic understanding of what it is. The key characteristics of the Forum that should be preserved over the long term include:

- The relatively small size
- The Forum's focus on networking and allowing time for conversations and collaborations to develop outside the actual conference program
- The Forum's emphasis on trends for the future, through which attendees can learn about new things coming, rather than exclusively about case studies of where other libraries have been

We make a number of recommendations, detailed in the "Recommendations" sections below.

- Define Forum's identity and rename it to reflect identity
- Major features of Forum need to have guidelines to planning and extensive documentation
- Involve public librarians & reach out to them as central participants in the Forum
- Examine outsourcing conference logistics and support
- Conference length should be two full days, on a Friday and Saturday
- Develop an attendee mentor program
- Make some subcommittees permanently a part of the Forum planning committee

- LITA staff work to improve relationships with vendors
- Investigate having Forum rotate among a small number of cities
- Investigate and implement more virtual keynotes and/or presentations
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Methods

The Task Force membership utilized numerous methods to gather information about LITA membership, LITA Forum attendees, and librarians/library employees who work with technology.

The Task Force met approximately every other week to discuss insights gained from each method and to brainstorm recommendations based upon data. A

Data collected include:

Examination of LITA Membership (Appendix A): We looked at the demographics of LITA Members as of March, 2016. This data was an output of the ALA membership database and was difficult to cross compare with other data sources. We were able to look at LITA membership in terms of position title, specialty, and library type.

Demographics of LITA Forum Attendees, 2011 – 2015 (Appendix B): Gathered from registration lists from the past five LITA Forums, the Task Force attempted to code demographic information the same as ALA codes its membership information. The resulting summary lists details of attendees on position title, specialty, and library type.

Comparisons between LITA Membership and LITA Forum Attendees (Appendix C): This was difficult due to different fields and codes between the Forum registration and ALA membership data. The Task Force attempted a comparison between the two groups. This data is not exact, and should be examined as trends and proportions, not exact percentages.

Survey (Appendix D): The Task Force created a survey to gauge perceptions of Forum, as well as of other library technology conferences and what individuals look for when they decide to attend a conference. The survey was distributed to many different

groups who may have some interest in technology and libraries, including LITA-L, ALCTS, public library lists, and academic library lists in May, 2016 and had statistical analysis completed by Yoo Young Lee.

Analysis of library technology conferences (Appendix E): Melody Condrón examined conference reports from librarians at her institution and compared them to LITA Forum. This comparison raised some questions as to what Forum could be doing as a conference.

Matrix Mapping (Appendix F): We struggled with how to complete the matrix mapping activity to measure the impact of Forum. Ultimately, Ken Varnum organized an activity that measured half of the 2016 Forum attendees before the event and half after. The task force came up with a list of Forum components to be measured on excellence in execution, depth, filling a gap, and community building.

Focus Groups (Appendix G): Members of the Task Force conducted a total of eight focus groups at Forum 2016 and online. We targeted certain populations, including LITA leadership, Forum attendees, types of libraries, and vendors. The focus groups allowed us to get more in-depth information and get feedback on specific ideas.

Interesting Insights

LITA Membership

- More than 40% of LITA members identify as an administrator
- Nearly 40% of membership works in an academic library, 17% public
- Membership is concentrated east of the Rocky Mountains

LITA Forum Attendees

- Approximately 50% identify as a librarian, 16% as an administrator, and 9% as IT
- 28% work in IT, Systems, Web Services, or a related technology unit; 27% are a librarian (assuming public services, not IT); and 11% are in technical services
- 68% are 4 year academic librarians, 13% public librarians

Comparison between Membership & Attendees

- Administrators are more likely to be LITA members but not attend Forum
- Forum attendees are most likely to be non-supervisory (assumption: early career) librarians
- IT staff who attend Forum are not members (assumption: sent by their administration to Forum)
- LITA Forum attracts more 4-year academic librarians than does LITA membership as a whole

Survey

- Frequent LITA Forum attendees state they always learn new and valuable things
- Attendees come to Forum to keep up with technology trends, network, and learn new things
- Cost was a major impediment for attendance, as was location, and these two factors are frequently intertwined
- When individuals determine how to spend travel/professional development funds, LITA Forum is frequently not high on their individual conference lists

- Content of conference is also very important in deciding to attend a conference
- Librarians often must prioritize conferences they are required to attend (e.g. for committee work)
- Librarians look to conferences to have practical sessions, networking opportunities, and hands-on components
- Keynotes are not important to conference attendees
- There is interest in having conference sessions recorded for future use as well as having a virtual, streaming option for those unable to travel

Conference Comparison

- Forum has more keynotes than most conferences
- Cost is similar to other conferences
- LITA has fewer hands-on opportunities and fewer panels
- Other conferences invite presentations, use more “crowd” input
- There are not many other conferences with similar focus to LITA Forum in the Fall

Matrix Mapping

- Attendees are happy with how Forum is executed
- Keynotes may not be filling a gap or creating much depth
- Poster sessions are not important
- Dine arounds are key to building community
- The website is useful, but could be more of an opportunity for community building
- Inclusion of first-timers is good

Focus Groups

- Networking and informal interaction are strengths of Forum
- LITA and Forum as names are not clear to people not active in LITA
- LITA Leadership believes the LITA and Forum brands are important

- There is a belief that administrators grow out of Forum, so we need to better define the audience
- There are mixed feelings about keynotes
- Perhaps Forum should not be every year, should be in rotating locations, and be more virtual
- Like the practicality and small size
- Vendors want to play a bigger role and are eager to support LITA

Conclusions

- We need to define what LITA Forum is, and who the audience is
- Forum attracts early career academic librarians, who may not necessarily be LITA members, who want the opportunity to present for tenure/promotion requirements.
- LITA Forum material is very broad, too broad for some, and deals mostly with technology implementation in academic libraries
- There is not a lot of content for administrators, who are looking for technology trends and future directions instead of technology projects
- Cost has the biggest influence on attendance, and it is not just registration cost, but travel and hotel
- LITA Forum tries to deal with all technology related to libraries, but that comes across as being unclear as to who its audience is, or understanding the purpose of the conference.
- There is interest in streaming or recorded sessions

Recommendations

1. Identity

The Task Force struggled throughout its work with the identity of LITA Forum, and we believe that it needs to be clearly articulated.

- a. **Identity:** LITA Forum is a small general library technology conference with a strong focus on networking with colleagues and building professional connections.
- b. **Audience:** Academic and public librarians with an interest in understanding and integrating technology into library services.

2. Name

The Task Force found that many possible attendees were not familiar with LITA or thought the word “Forum” was not clear. As calling it a conference causes issues with ALA, we opted to elaborate on the name of LITA Forum. The new name still uses LITA and Forum, but explains more about the identity of Forum.

- a. **New Name:** Library Technology Forum brought to you by LITA. ~~With that, Ken Varnum won the Task Force.~~

3. Overall

- a. **Guidelines:** Many of the recommendations the Task Force is putting forth require guideline(s) to be written in support of the item. We see that many processes and functions of both the Forum Planning committee and LITA staff are not clearly outlined or articulated. Many of the items that previous planning committees have undertaken have not been documented, which means future planning committees must re-do everything from scratch, or attempt to

remember what worked and what did not in previous years. To help with continuity over multiple years and protect in case of an emergency, having guidelines for various aspects of Forum is necessary. This report notes areas where guidelines are necessary, but this idea underlies most of the report.

- b. **Documentation:** Other than a timeline, little is documented about how LITA Forum is planned. This frequently causes confusion, causes issues with continuity and committee turnover, and makes planning go less smoothly than it can. There is also a dependence on LITA staff to answer basic questions. With proper documentation, LITA staff could focus on more important issues. Documentation needs to define the responsibilities of both LITA staff and the Forum Planning Committee, all aspects the Planning Committee undertakes, and guidelines for the different Forum components. The Task Force recommends that a wiki be established for this purpose, which should be maintained by both the Planning Committee and LITA staff.
- c. **Public Librarians:** The Task Force believes LITA Forum can do a better job reaching out to, and meeting the needs of, public librarians. Involving public librarians should be a constant effort and be integrated into the core of Forum. Public librarians need to be on the planning committee, be invited to present, and be heavily marketed to. Forum should also have components that are solely for them, such as a conference track, specific lightning talk sessions, and networking events.

4. Logistics

- a. **Outsourcing Logistics:** LITA should pursue obtaining quotes for outsourcing various logistics related to running Forum. The Task Force recommends analyzing the costs associated with outsourcing compared to LITA staff time. While we acknowledge that the costs of outsourcing Forum logistics may

be expensive, it could free up staff time to work on higher value things such as vendor relations, which ultimately bring in money and can help Forum become more profitable. Outsourcing may also lead to more advanced planning, which can lead to vendors having more time to plan their participation. Additionally, planning can help Forum get more popular keynoters, who are frequently booked a year in advance.

- b. **Forum Structure:** The Task Force strongly believes that Forum should encompass two full days, with full or half-day pre/post conferences. Eliminating the half days will hopefully eliminate a free morning for those unable to get to Forum before the current noon start time. By ending at the end of the second full day, many attendees must spend an extra night, so they will not be tempted to leave early. We also believe that there can be more casual networking options (i.e. dine arounds) the evening of the second conference day, as well as half-day post-conferences or other events the morning after.
- c. **Days of the Week:** The Task Force debated at length as to what days the conference should be on, ultimately compromising that Forum should be on a Friday and Saturday, with possible future assessment to see if it can be on two week days. The academic nature of the task force favors Forum occur during the week since they get release time to attend. However, we recognize that many public librarians do not get release time and prefer to go to conferences over weekends.
- d. **Planning Committee Subcommittees:** Any aspect of Forum that is undertaken by the planning committee should be given its own subcommittee so that committee members can focus their efforts. Examples include local arrangements, lightning talks, invited concurrent sessions, solicited concurrent sessions, keynotes, networking, marketing/social media, wiki/website, student assistant, speaker liaison, assessment, food, registration, Call for Proposals, social events, sponsorship, membership, program scheduling. Each

subcommittee needs documented guidelines to complete their designated task/activity. Subcommittees need only a couple of members and members may serve on more than one subcommittee. As there are many subcommittees, the size of the planning committee overall may need to increase to make sure there is adequate coverage for each.

- e. **Bundle Membership/Forum:** The Task Force believes that LITA Membership and Forum registration should be able to be bundled together, in the hopes that more attendees will opt to become LITA members.
- f. **Mentor Program:** A simple mentor program needs to be instituted at Forum so that new attendees meet someone, build community, and can learn more about Forum and LITA. At registration, give attendees a checkbox to volunteer to be a mentor or mentee. A subcommittee of the planning committee can match mentors/mentees. If additional mentors are needed, LITA leadership should be asked to participate.

5. Location

Location plays a major role in determining whether to attend a conference. Proximity is important, but costs associated with the location is important to attendees.

- a. **Fewer Locations:** The Task Force believes that LITA staff should look at holding Forum in the two or three cities on a rotating basis, preferably not on the east or west coast. We think that signing multiple year contracts may provide us with discounts, would save valuable planning time, would allow staff to know more about the conference space and amenities, and attendees can have a general idea about hotel and transportation costs ahead of time.
- b. **Location Characteristics:** The members of the Task Force have no shortage of recommendations for possible Forum cities. However, common

characteristics include a major airline hub, reasonable accommodation costs, diverse restaurants and attractions, and locations that have favorable social/political conditions to ensure the safety of all attendees.

6. Vendor Relations

LITA needs to have better relationships with vendors and allow them to have a larger role in Forum.

- a. **LITA Staff and Vendor Relationships:** One LITA staff member needs to have vendor relations as a part of their job description. This person would form relationships with vendors, so when needed, they can call on them for funding, both for Forum and other LITA events. The Task Force's conversations with vendors indicated that vendors want to support conferences and associations, but they want to have a conversation to make the benefits mutual. It is difficult for a committee that operates for only one year to maintain vendor relationships. For continuity, this responsibility must fall to LITA staff. This would also serve to more formally and permanently document the course of the LITA-vendor relationship, including giving/sponsorship history.
- b. **Conference Prospectus:** Vendors would like to know as much as possible about who attends LITA Forum. The conference prospectus needs to be improved to provide as much demographic data as possible, including types of libraries, size of institutions, buying power, position titles, etc.
- c. **Attendee List:** Supply sponsors with a registration list before Forum and an attendee list after. These lists are a tangible item vendors take away from a conference, and allow vendors to start a conversation before the conference and continue it after.

- d. **List of Sponsorship Opportunities:** Before approaching vendors, LITA needs to continue to develop a list of detailed sponsorship opportunities and their costs. Vendors want this information up front, either to choose from the list, or open a conversation. Examples of this list would be “Coffee Break including light snacks, \$X.XX” and “Logo on conference materials XYZ, \$X.XX”. If the vendor sponsors something that is at a designated time, such as a coffee break, they should be given time to pitch their product.
- e. **Planning Time:** Sponsors need as much time to plan as possible, especially if they are sending people to a conference as their may be other conflicting conferences. Additionally, funding can be scarce, so it is best to ask as early as possible--right after the preceding Forum, as soon as a location is confirmed and the vendor prospectus is available.
- f. **Conference Participation:** Vendors do not want to throw money at a conference, but they must get something in return. They want to play an active role, presenting and getting time for conversations with attendees. Therefore, the Task Force recommends explicitly allowing vendors to present at LITA Forum, with clearly defined guidelines so the presentation is not a pure sales pitch. Possible guidelines can include co-presenting with a library partner; presenting a case study on an underlying technology of a product or how the product came to be (but not a case study on a specific implementation), or being a part of a vendor panel on a specific technology (i.e. discovery systems).

7. Virtual Aspects

There is a desire for more virtual options related to Forum. The Task Force did not believe that Forum should be solely virtual because the social and networking opportunities are a strength of having an in-person event. We found that there are people who prefer virtual conferences due to travel costs and logistics, but there are

others who would never attend a virtual conference because they lose the social conference aspects and find it difficult to focus.

- a. **Virtual Conference:** Form a new task force to examine and develop the capacity for LITA to conduct online conferences and events beyond webinars and, based on the results, consider alternating years between a full (multi-day) virtual Forum and the current in-person Forum.
- b. **Streaming/Recording Presentations:** We recommend forming another task force to examine the logistics and costs to record and/or stream sessions and/or keynotes at Forum for synchronous and/or asynchronous viewing. Although streaming has been attempted in the past, LITA needs to develop a documented process, market them, and charge for the content for several years before making a final determination to not record. The Task Force believes that this task force might be an interesting Emerging Leaders Project.
- c. **Offer Popular Presentations as Webinars:** The Forum Planning committee and LITA staff should collaborate with the education committee to create webinars of popular Forum presentations. This will allow LITA to get some Forum content out to a wider audience and monetize presentations at the same time. LOEX did this for some of its 2016 presentations, and has plans to repeat in 2017: <http://www.loexconference.org/virtual-sessions.html>.

8. Topics & Tracks

The issue of program tracks is brought up by every planning committee, with some committing to tracks, and others not. The Task Force believes there should be conference tracks, and the sessions should be at least in part developed around defined tracks.

- a. **Conference Theme:** An overarching conference theme needs to be decided on early in the planning process and appear in the Call for Proposals. In the past, the theme is a catchy slogan but the content of the Forum does not necessarily reflect the theme. The Task Force report mentions things that should be tied to the theme several times in this report.
- b. **Topics:** Topics are used in the Call for Proposals to help the planning committee create a cohesive conference. Topics are under the overall conference theme and are important because they help attendees and their administration determine whether they should attend a conference before the full schedule is released. Conference topics need to be determined before the call for presentations is released. The call should specifically ask for presentations on certain topics and these topics may ultimately become tracks. On the proposal submission form, the presenter should select from a defined list of bullet points that define their topic(s). There should, however, be a place for presentations to be submitted that do not fill in the list of topics. These should be considered alongside the other presentations.
- c. **Conference Tracks:** The Task Force believes that conference tracks are necessary for Forum, and make the conference more appealing to certain groups of attendees who are looking for something specific in the sessions. Tracks should change from year to year depending on current trends and whatever the planning committee wants to highlight in a given year. While we stopped short of recommending specific track names, future planning committees should be aware of some groups/ideas that could be represented by specific tracks, including:
- Different career stages: early/middle/advanced
 - Administration of IT
 - Public Libraries
 - Future Trends

9. Presentations

- a. **Inviting Presenters:** The Task Force recommends formally inviting presenters for up to half of the session slots. This will allow the planning committee to have more control over the types of sessions, the quality of presenters, and focus on specific topics/tracks.
- b. **Hands-On:** The Forum Planning Committee has solicited hands-on sessions in the past, but few presenters have made their session truly hands-on. However, hand-on is one of the more common suggestions to improve Forum and something that is appealing about other conferences. Therefore, Forum should invite some speakers with the requirement that they present something in a hands-on manner. Hands-on sessions should be 45 minutes in length and be in a room with tables and power strips.
- c. **Invite LITA Authors/Educators:** One source for possible presenters to invite are the authors of various LITA publications and those that have taught a LITA educational offering. This will hopefully bring in good quality speakers who are well known to attendees and leaders in the field. There should be documented guidelines about the invitation process, to guarantee a diversity of backgrounds, institutions, and topics.
- d. **Panel Discussions:** Panel discussions are one session format that LITA has not actively encouraged in the past, but the Task Force believes should be solicited. Panels are more interactive, and can involve vendors. The Planning Committee can invite a moderator who will then select panelists that fits into the panel theme.
- e. **Webinar on how to Propose and Present:** Alongside the call, the Planning Committee and/or Education Committee should have a free webinar about what the Planning Committee is looking for in proposals. This is also a good time to

provide instruction as to how to present, how to facilitate a panel, how to make a presentation interactive/hands on, accessibility, and how to teach online.

- f. **Presentation Quality:** As there have been concerns in the past about the quality of some of the session speakers, we recommend that each submission include information about their hands-on teaching/presentation experience, and how they will engage their audience. Accepted presenters should be able to provide a biography, a summary, and the actual presentation by predetermined dates. Ideally, this is done by LITA staff to ensure consistency from year to year, but it could also be the Planning Committee's responsibility. Whoever does this, there should be guidelines in place.
- g. **Speaker Liaisons:** While we believe that LITA staff are best able to communicate with presenters and make sure they adhere to important milestones; this could also be the responsibility of designated liaisons within the Planning Committee. The Task Force sees the responsibilities of these volunteer speaker liaisons as follows:
- Act as the presenter's primary contact for Forum
 - Respond to presenters' questions/comments within a reasonable amount of time
 - Be sure the conference abstract matches the presentation content
 - Make sure the presenter adheres to all milestones, including outline and presentation deadlines
 - Go over the presentation outline to be sure it aligns with the program summary
 - Work with the presenter to determine the type(s) of interactivity to be included and be sure the presenter has the necessary resources
 - Offer to listen to a practice session virtually
- h. **Topic Voting:** Voting about specific presentations or conference topics has always been done by the Planning Committee, and each year voting is

executed in a different way. The Task Force believes that crowd participation is important, and would like public voting to be a standard task. We think that these voting results should be given consideration, but that the Planning Committee should make the final decision as to whether the presentation is accepted or not. Voting should have guidelines and a timeline.

- i. **Lightning Talks:** These short, often off-the-cuff talks are very popular and should be continued. However, they are often too quickly planned and lack structure, and currently lack any definitive guidelines or documentation. The Task Force would like to see some lightning talks planned before Forum, but leave space for spontaneous talks that arise at Forum. We would also like to have shorter sessions, but have lightning talks each day of the conference, and consider having separate sessions for academic and public librarians. Lightning talks should be in a smaller room to facilitate the rapid exchange of ideas and be less intimidating to speakers not used to an audience. The talks should also be promoted to potential attendees throughout the program planning and registration process, so that potential speakers are aware and can be thinking about a possible talk.

- j. **Birds of a Feather Sessions:** The Task Force believes these sessions are important networking opportunities and need to be a permanent fixture in Forum. These sessions need to have guidelines and each should have a designated point person for effective planning. We would like to see designated times for birds of a feather sessions, such as over meal times, open times, and off-site at restaurants. We would also like at least some of these sessions early in the conference so that attendees can meet others with similar interest to connect with throughout Forum. Finally, we suggest themes, such as having specific sessions for public librarians or specific geographical regions.

- k. **Poster Sessions:** Although posters may not have as much impact as presentations, the Task Force wants posters to continue to be a part of Forum. Posters often attract new and younger librarians who may not have experience presenting and they often help individuals obtain funding to come to Forum. However, the Task Force believes that the poster session is the aspect of Forum most in need of guidelines, so presenters know exactly what to expect on-site.
- l. **Presentation Length:** We acknowledge that the length of presentations have been changed from year to year, and offer no real recommendations as to what presentation length is ideal. However, shorter presentations should not occur at the same time as longer presentations to allow attendees to change presentations/rooms without disturbing others. We also want longer presentation times (~45 minutes) to be reserved for presentations with interactive components or panel discussions.
- m. **Pre/Post Conferences:** The Task Force recommends that pre/post conferences should be half or whole day workshops that are tied to the conference theme/topics. We would like to see LITA try to do a post conference (over the weekend), to see if the slot would be popular. We also believe that pre/post conferences may be useful for vendors to present and sponsor the time

10. Keynotes

The Task Force discussed keynotes at length, especially if we put too much emphasis on them and if there were too many at Forum.

- a. **Number of Keynotes:** We ultimately believed that there are too many keynotes at Forum. The task force would like to see no more than 1 keynote for each full day of Forum, so under the proposed structure, there would be no

more than 2 keynotes. The Task Force also believes that only one keynote may be enough, especially if the one keynote is very expensive or logistically difficult.

- b. **Attendee Participation:** Recruiting keynoters to conduct a workshop, or a pre/post conference should be considered. There may be an additional cost, but if LITA can monetize the workshop, it would be value added to participants. Additionally, the Task Force thinks it would be interesting to have a guided discussion about a keynote during the session block immediately following.

- c. **Keynote Topics:** The keynote topics should align with the theme of the conference. The Planning Committee also should consider keynotes from a variety of diverse areas, not just library technology. The Task Force has several examples, including:
 - Representative from the broader IT Industry, outside of libraries
 - Represents local conference community
 - Social Justice related to the community, information, technology, or libraries
 - Be an Inspirational Librarian
 - Diversity of race, disability, socioeconomic status, gender, etc.

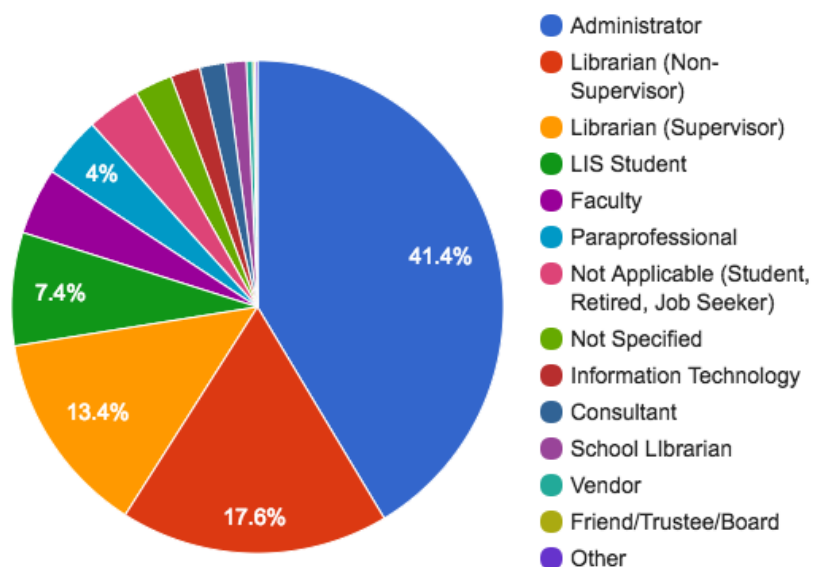
Appendix A – Examination of LITA Membership

The following represents a summary of LITA Membership, based on a snapshot of data exported by Mark Beatty on March 8, 2016. At the time, LITA had 2317 members.

Membership By Position:

Position	Count
Administrator	786
Librarian (Non-Supervisor)	335
Librarian (Supervisor)	255
LIS Student	141
Faculty	83
Paraprofessional	76
Not Applicable (Student, Retired, Job Seeker)	67
Not Specified	47
Information Technology	37
Consultant	32
School Librarian	26
Vendor	8
Friend/Trustee/Board	3
Other	3

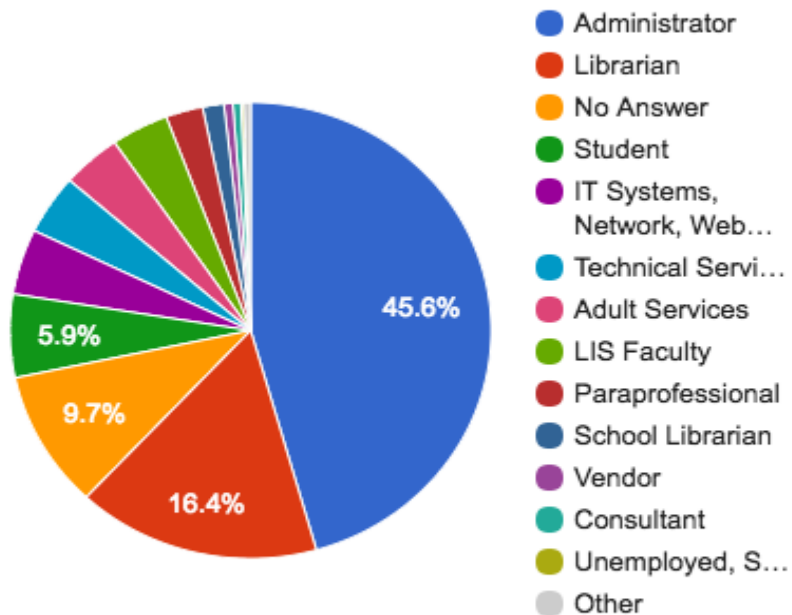
LITA Membership by Position



Membership by Specialty:

Specialty	Count
Administrator	766
Librarian	275
No Answer	163
Student	99
IT Systems, Network, Web Services	78
Technical Services (inc. E-Resources, Acquisitions)	71
Adult Services	67
LIS Faculty	65
Paraprofessional	42
School Librarian	24
Vendor	10
Consultant	9
Unemployed, Student, Retired (non-salaried)	3

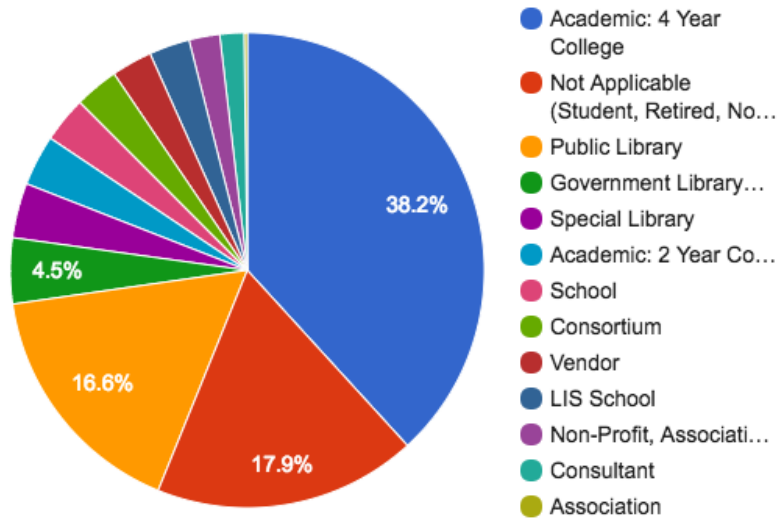
Membership by Specialty



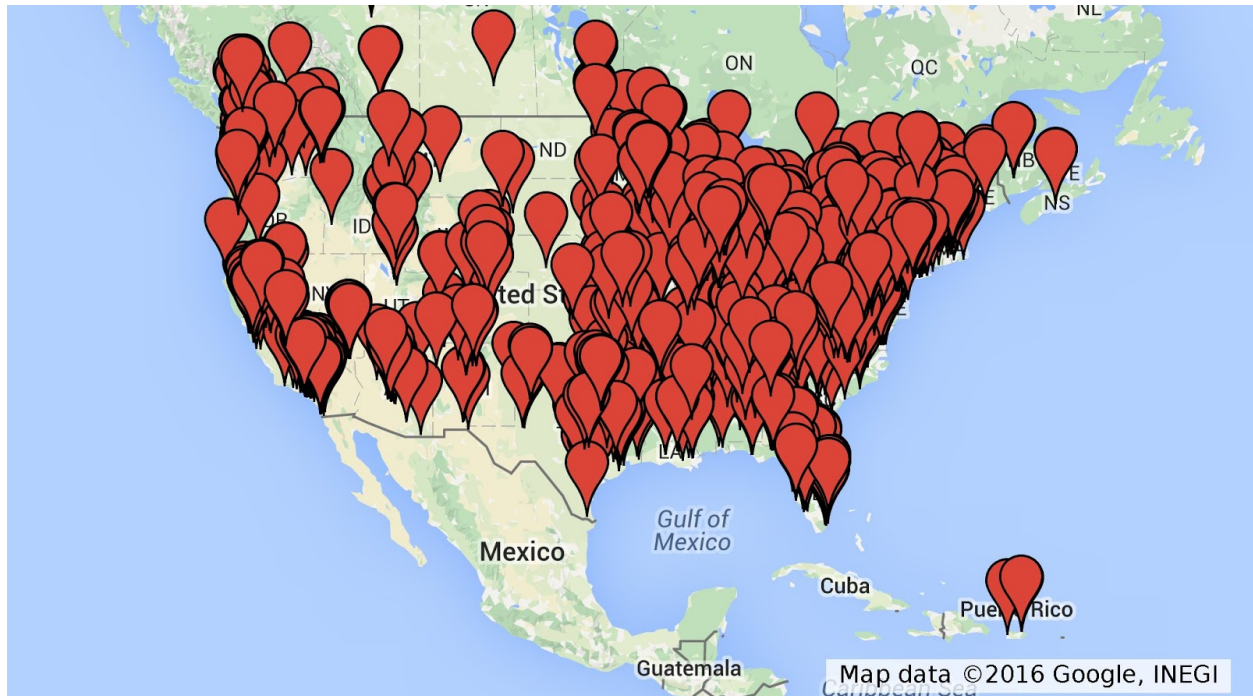
Membership by Organization Type:

Organizaton Type	Count
Academic: 4 Year College	675
Not Applicable (Student, Retired, Non-Salaried)	317
Public Library	293
Government Library or Agency	79
Special Library	66
Academic: 2 Year College	61
School	55
Consortium	53
Vendor	49
LIS School	49
Non-Profit, Association, or Foundation	37
Consultant	29
Association	4

LITA Members by Organization Type



Membership by Geography (zip code) is available at
<https://drive.google.com/open?id=1Sb9oIKfshBecybWzEqpfbpUQdy0&usp=sharing>



Appendix B – Demographics of LITA Forum

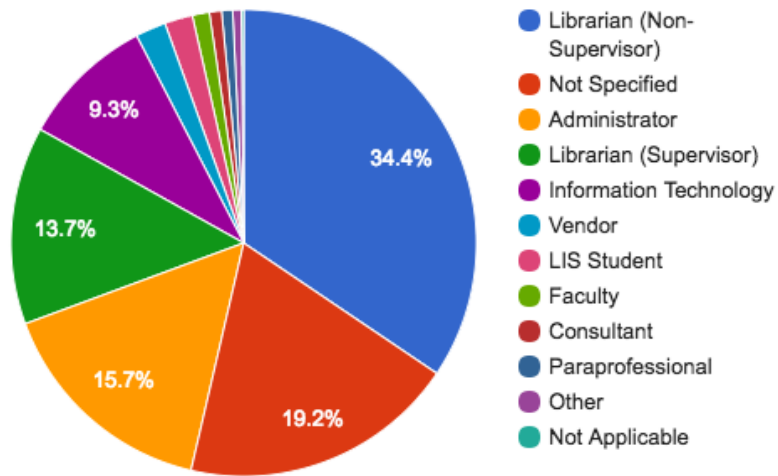
Attendees, 2011 – 2015

These charts and graphs represent LITA Forum attendees from 2011-2015. When registering, attendees were asked for their title and institution. We attempted to code this information using ALA's membership codes in order to align with the codes used for the LITA Membership Snapshot.

Attendees by Position:

Position	Count
Librarian (Non-Supervisor)	407
Not Specified	227
Administrator	186
Librarian (Supervisor)	162
Information Technology	110
Vendor	25
LIS Student	23
Faculty	14
Consultant	10
Paraprofessional	9
Other	7
Not Applicable	2

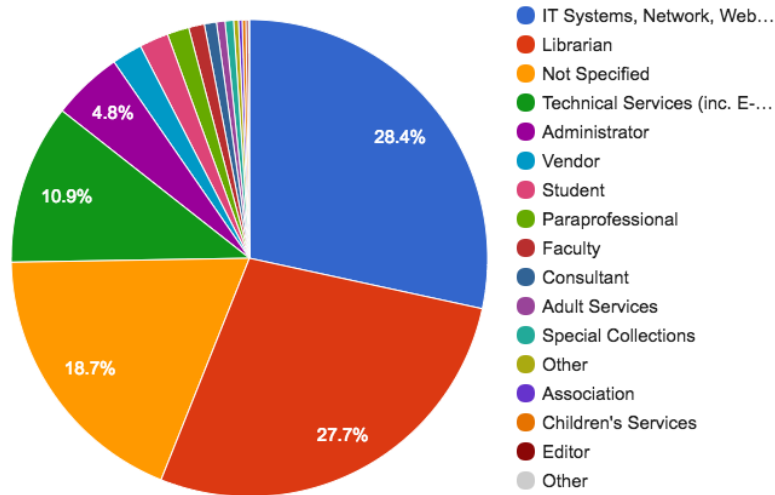
Forum Attendees by Position



Attendees by Specialty:

Specialty	Count
IT Systems, Network, Web Services	345
Librarian	336
Not Specified	227
Technical Services (inc. E-Resources, Acquisitions)	132
Administrator	58
Vendor	25
Student	24
Paraprofessional	18
Faculty	13
Consultant	10
Adult Services	7
Special Collections	7
Other	4
Association	3
Children's Services	3
Editor	2
LIS Faculty	1

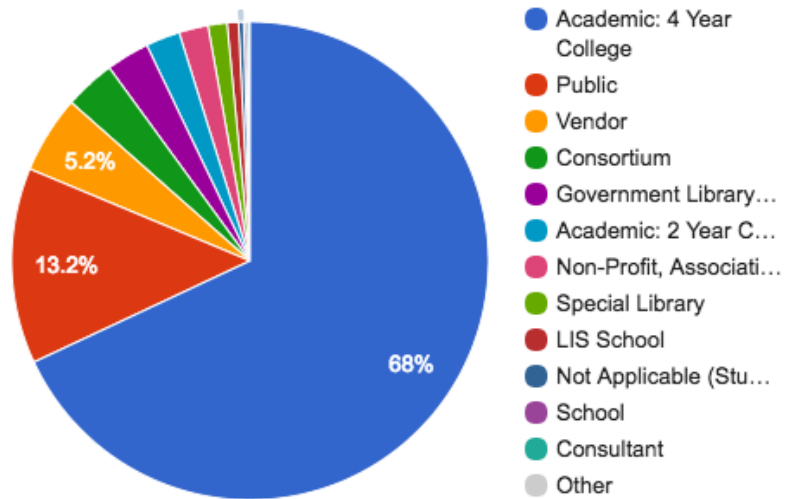
Forum Attendees by Specialty



Attendees by Organization Type:

Organization Type	Count
Academic: 4 Year College	792
Public	154
Vendor	61
Consortium	40
Government Library or Agency	34
Academic: 2 Year College	27
Non-Profit, Association, or Foundation	23
Special Library	15
LIS School	9
Not Applicable (Student, Retired, Non-Salaried)	4
School	2
Consultant	2
Association	1

Forum Attendees by Organization Type



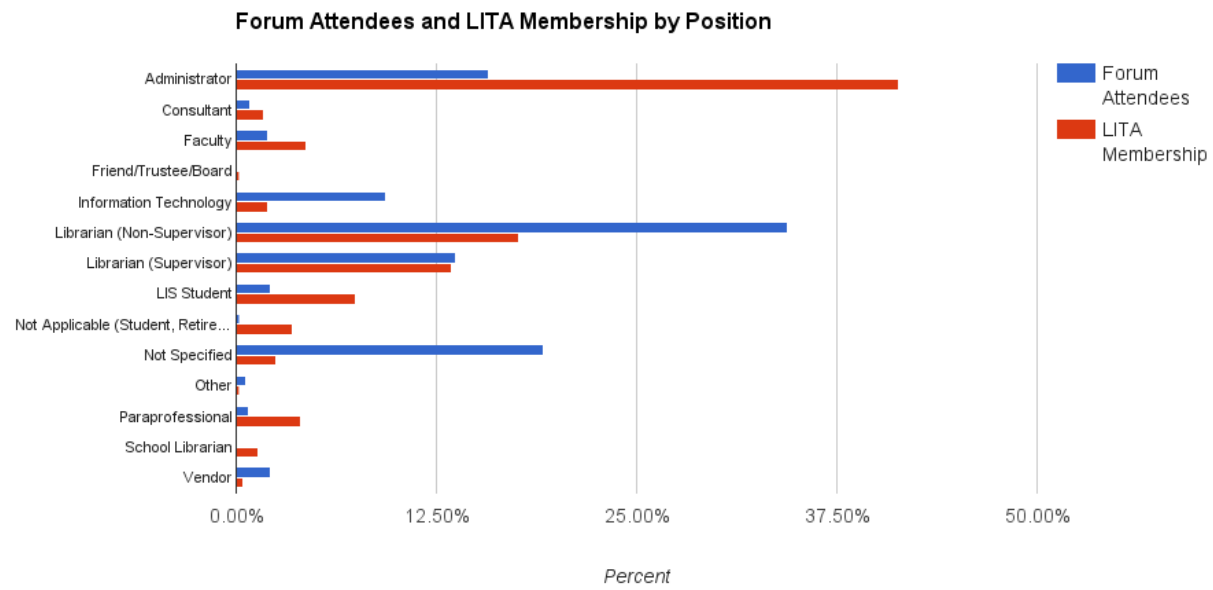
Appendix C – Comparisons between LITA

Membership and LITA Forum Attendees

The Forum attendees were coded per the ALA membership codes so attendees can be compared to the overall LITA membership. The data was broken down as a percentage of total responses for each group.

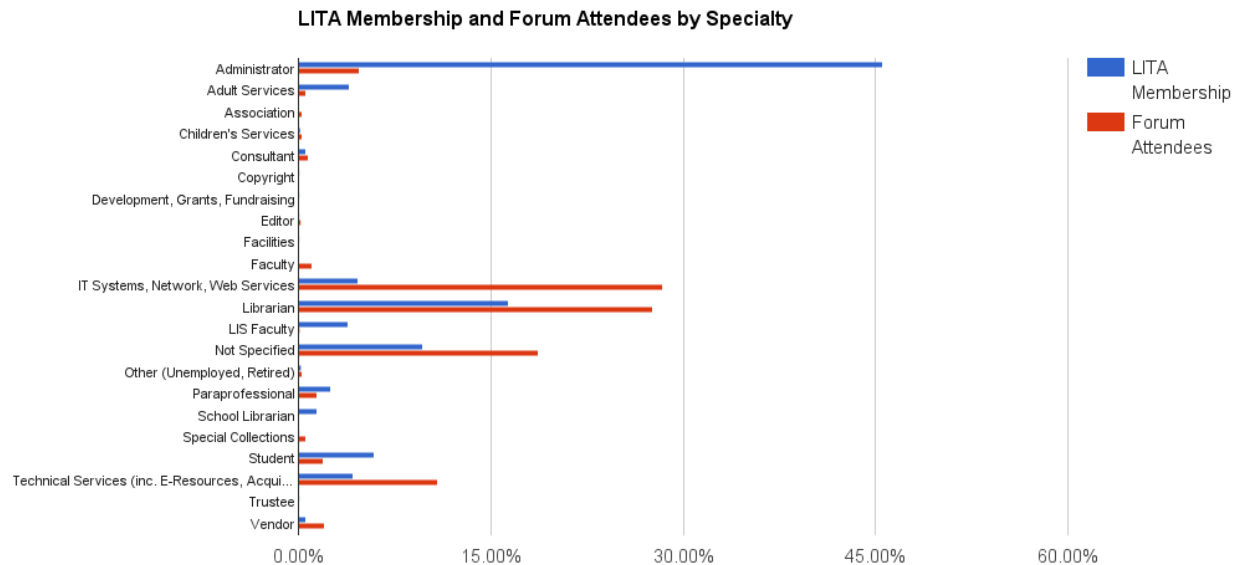
By Position:

Position Category	LITA Membership	Forum Attendees
Administrator	41.39%	15.73%
Consultant	1.69%	0.84%
Faculty	4.37%	1.94%
Friend/Trustee/Board	0.16%	0.0%
Information Technology	1.94%	9.30%
Librarian (Non-Supervisor)	17.64%	34.43%
Librarian (Supervisor)	13.43%	13.70%
LIS Student	7.42%	2.11%
Not Applicable (Student, Retired, Job Seeker)	3.53%	0.17%
Not Specified	2.47%	19.20%
Other	0.16%	0.59%
Paraprofessional	4.00%	0.76%
School Librarian	1.37%	0.0%
Vendor	0.42%	2.11%



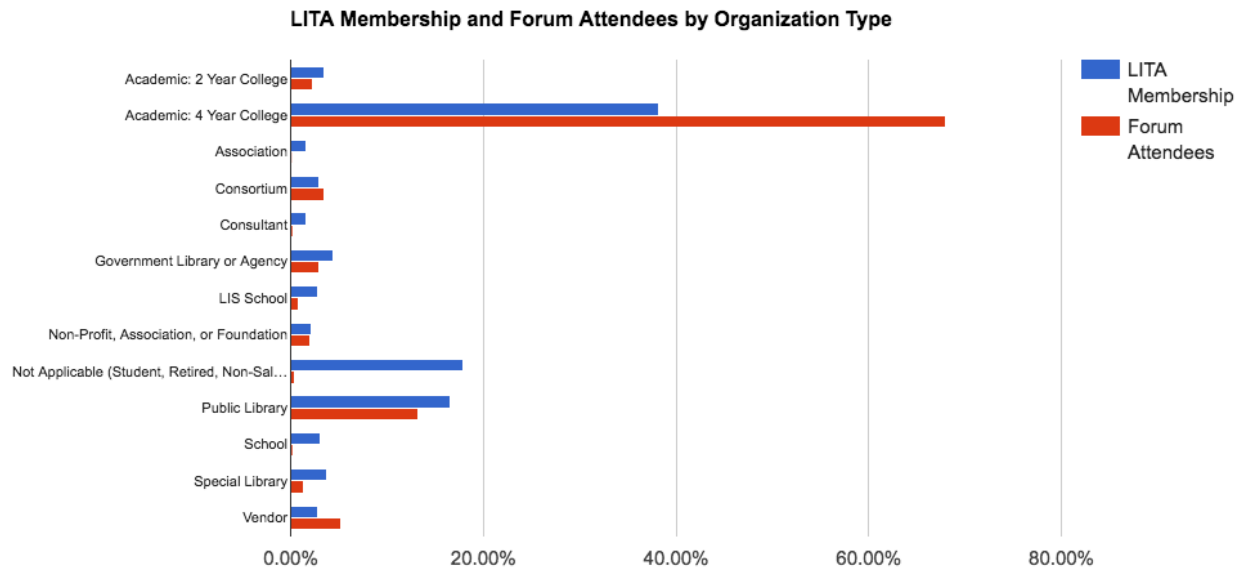
By Specialty:

Specialty Category	LITA Membership	Forum Attendees
Administrator	45.59%	4.77%
Adult Services	3.99%	0.58%
Association	0.00%	0.25%
Children's Services	0.12%	0.25%
Consultant	0.54%	0.82%
Copyright	0.06%	0.00%
Development, Grants, Fundraising	0.06%	0.00%
Editor	0.06%	0.16%
Facilities	0.06%	0.00%
Faculty	0.00%	1.07%
IT Systems, Network, Web Services	4.64%	28.40%
Librarian	16.37%	27.65%
LIS Faculty	3.87%	0.08%
Not Specified	9.70%	18.68%
Other (Unemployed, Retired)	0.18%	0.33%
Paraprofessional	2.50%	1.48%
School Librarian	1.43%	0.00%
Special Collections	0.06%	0.58%
Student	5.89%	1.97%
Technical Services (inc. E-Resources, Acquisitions)	4.23%	10.86%
Trustee	0.06%	0.00%
Vendor	0.59%	2.06%



By Organization Type:

Organization Type	LITA Membership	Forum Attendees
Academic: 2 Year College	3.45%	2.32%
Academic: 4 Year College	38.20%	68.04%
Association	1.64%	0.09%
Consortium	3.00%	3.43%
Consultant	1.64%	0.17%
Government Library or Agency	4.47%	2.92%
LIS School	2.77%	0.77%
Non-Profit, Association, or Foundation	2.09%	1.98%
Not Applicable (Student, Retired, Non-Salaried)	17.94%	0.34%
Public Library	16.58%	13.23%
School	3.11%	0.17%
Special Library	3.73%	1.29%
Vendor	2.77%	5.24%



Appendix D – Survey

1. Have you ever attended LITA Forum?

There were 308 participants who completed this question, 127 (41.2%) have attended Forum and 181 (58.8%) have not.

2. How many times have you attended a LITA Forum?

This question, asked if a participant answered yes to question 1, had 116 responses. Fifty-six (48.3%) have attended one Forum, 50 (43.1%) have attended 2-4 Forums, and 10 (8.6%) have attended LITA Forum 5 or more times.

Statistical analysis showed that individuals who have attended Forum 5 or more times indicate that they always learn new and valuable things. The number of times someone has attended Forum has nothing to do with the following variables: costs, inconvenient location, vendors, keynotes, having a role in the conference.

There is no significance between the type of both library worker and organization and the number of times they have attended Forum. Title also does not have an impact on attendance.

3. Did you attend the 2015 LITA Forum in Minneapolis?

Of the 116 responses, 56 (48.3%) attended Forum in Minneapolis and 60 (51.7%) did not.

4. If you have attended 1 or more LITA Forums, please tell us why.

Of the 117 responses, half attend so they can keep up with tech trends, 46% to network, and 40% to learn new things. About ¼ of attendees attend because it is fun, ⅓ to be inspired by the keynote. 18% gave no reason.

5. If you have previously attended a LITA Forum and have not returned, please tell us why.

Of the 177 responses, 54% said that they did return, so this question was irrelevant to them. After taking these responses out of the statistics, 36% found it cost-prohibitive, which was the highest result. The next group was clustered at 18%, 17%, and 16% - had a role in Forum, inconvenient location, and irrelevant programming, respectively. Interesting comments about LITA being too broad to their work and that many did not even know about it.

6. Ok, so you have never attended LITA Forum. Are there particular reasons why?

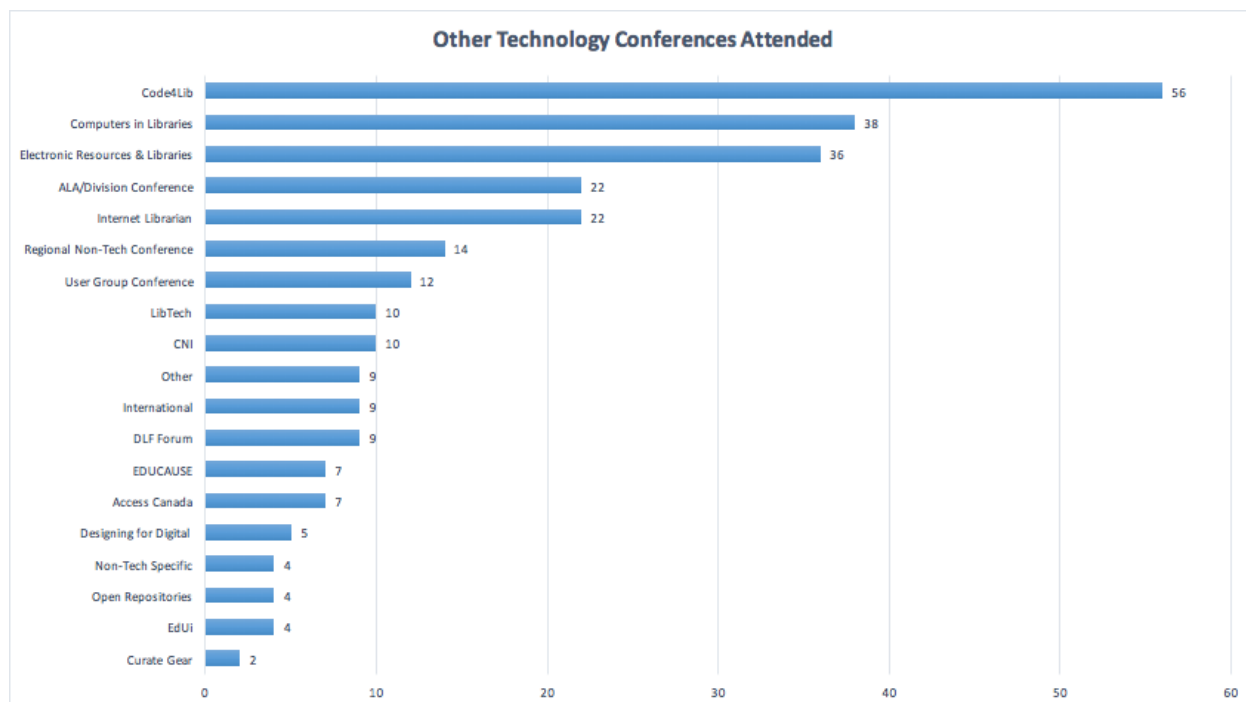
There were 157 participants who answered this question (151 skipped it). Multiple options were allowed. The most commonly selected options were (including 75 coded “Other” responses):

- “Attendance and associated costs have been prohibitive” (85 times)
- “Other -- Didn’t know about the Forum” (27 times)
- “Inconvenient LITA Forum location” (27 times)
- “Other -- Attend other conferences” (18 times)
- “Unappealing keynote presentations and program sessions” (10 times)

7. Beyond LITA Forum, what conferences have you attended in the past five years that had the best sessions related to library technology?

Code4Lib was the most popular library technology conference, followed by Computers In Libraries, and Electronic Resources & Libraries. Twenty-two participants specified ALA Annual, ALA Midwinter, ACRL, or PLA Conferences for technical content, and 14 their state or regional library conference (i.e. California Library Association). User group conferences include vendor-specific conferences, such as Ex Libris Users of North America (ELUNA) or Innovative Users Group (IUG).

Statistical analysis showed that academic librarians were likely to attend/rate highly Code4Lib and Electronic Resources & Libraries.



8. Compared to other conference, please rate the value of LITA Forum.

Due to an issue with the survey question, we did not get good data from this question as most of the responses were “Not Applicable”. Coding the responses gave us nearly equal numbers of positive and negative traits. Among things that had more than one response, three said they had a good previous experience with LITA Forum, 3 believed the content was redundant with other conferences or Forum needs a stronger identity, and 2 each saw Forum as being too dated, too expensive, too disorganized, or did not have good topics.

9. What are the most important aspects to consider when choosing to go to a conference?

Of the 222 that answered this question, the presentations were the most important at 88% (grouping Important and Most Important together). Price came in second at 83%, and Location at 61%. Least Important was Professional Obligations (37%). Even aggregating Least Important and Somewhat Important, Professional Obligations was rated the least important (60%).

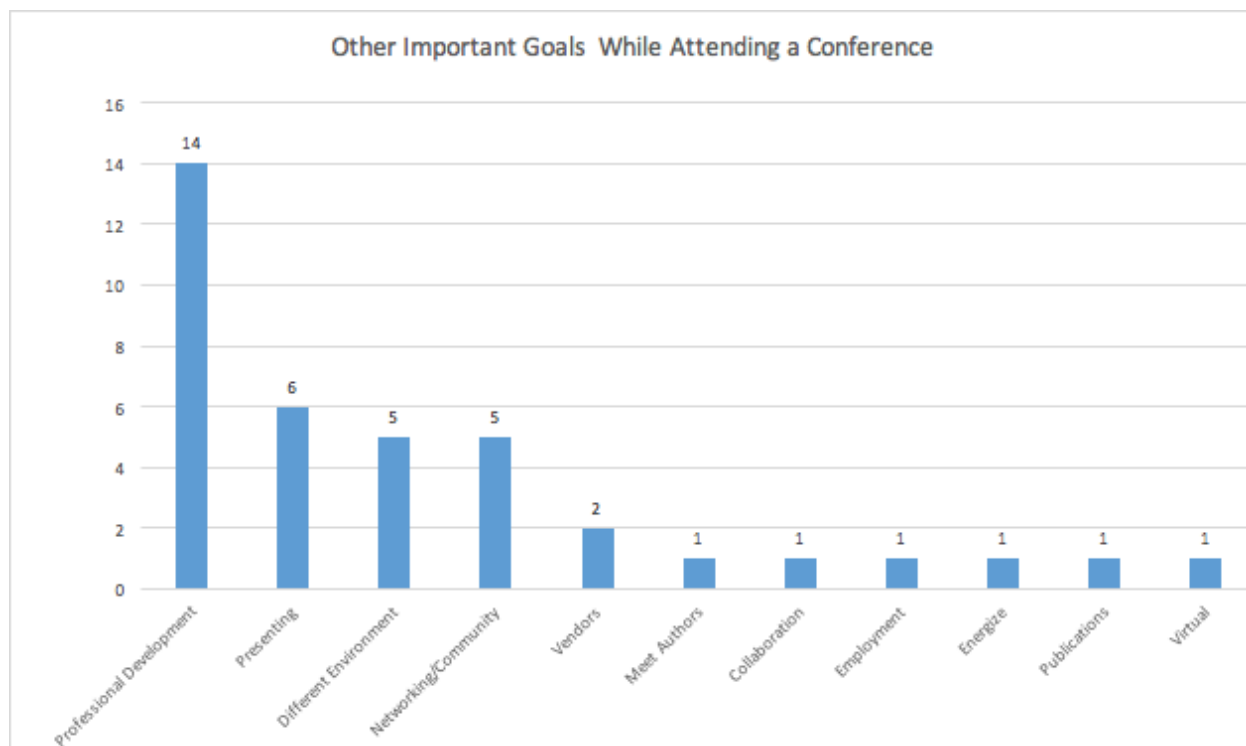
Comments include taking into consideration a price differential for membership, e.g., if must be a member, won't go. Also, a comment that, although Price was the most important factor for one person, they realize that the registration cost is rarely the bulk of the price.

10. When you attend a conference, what do you hope to gain?

All four responses rated generally between 3 and 4 (the highest possible). Gaining information came out on top with 98% stating that this is important (aggregating Important and Most Important). The other three are within about .16 point of each other - Inspiration (3.0), Training/CE (2.99), and Networking (2.84).

12. Are there other things you hope to gain from a conference that weren't mentioned in the previous question? Great! Please share with us other important goals you have when attending a conference.

When asked to fill in other goals when attending a conference, there were 38 responses. Professional development was the most cited goal, with 14 (36.8%) mentioning something related to it, including learning practical skills, different perspectives, trends, and best practices. Six participants (15.8%) stated the ability to present was important and 5 each (13.2%) mentioned being in a different environment and networking or building a sense of community.



13. Please describe your ideal library technology conference experience?

There were a lot of great suggestions to pull out of these responses. Quite a few of them mention personal interaction, networking, breakout sessions, and more hands-on activities. Very specific ideas were added to the recommendations document so we can talk about them later.

Of the responses, 173 people did not provide a response and 12 provided only very basic things (“relevant topics & great speakers”). Other comments can be broken into these categories:

- Practical solutions to technology problems (29)
- Planned social & networking at the conference (29)
- Hands-on components (25)
- Focus on new and cutting-edge technology (22)
- Planned collaboration time/breakout sessions (13)
- Host city & hotel are easy to get to, cheap, close to other amenities (12)
- High level technology/fewer basic tech sessions (8)

- Technology basics & common tools/fewer high-level sessions (7)
- Short sessions (5)
- Tracks (4)
- Small conference size (3)
- One or no keynote (3)
- Better vetting of presenters, presentations, descriptions (3)

Some of the most interesting comments:

- "One thing that bothers me about conferences is the emphasis on keynote speakers. Although they can be inspiring, I don't always believe that they are worth the cost. I'd rather know what my peers are doing, along with insight into bleeding edge technology, and forthcoming changes."
- "Grouping presentations by type of library or librarian duties to enable conference attendees to attend one day and get the most out of that day."
- "A single track makes it possible to record and caption the whole thing, so even if an attendee misses something, they can come back to it later. It also ensures a cohesiveness of experience--everyone attended the same conference, not 5 permutations of the same conference."
- "The Forum sits in between the basic tech zeitgeist CiL and IL (where I go to do business), the theoretical ASSIS&T, and the very informative Code4Lib and Access conferences. I would prefer a more focused event."

14. What are your top 3 library technology interests?

From the totals on the spreadsheet for all coded responses, "digital workflow"-type interests account for a considerable percentage of the total responses received (there were 4 opportunities to provide an answer here; 40% of all responses fell into "digital

workflow,” or n = 201). In the coding process, “digital workflow” was the umbrella term used to encapsulate responses involving discovery, tools, metadata, LMS, ILS, collection development, and automation. Additionally, other big areas of interest included:

- user experience (n = 89; 29% of 1st tier responses, 18% of overall);
- Programming (skills, not outreach) & Data Analysis (n = 66; 29% of 1st tier responses, 13% of overall);
- Management [including problem solving, evidence-based practices/case studies, vendors] (n = 61; 11% of 1st tier responses; 13% of overall responses);
- Student Learning [including instructional tech] (n = 45; 38% of 1st tier responses, 9% of overall responses); and
- Emerging Technologies (n = 44; 36% of 1st tier responses; 9% of overall responses)

15. Would you be interested in any of the following conference virtual participation options, if developed?

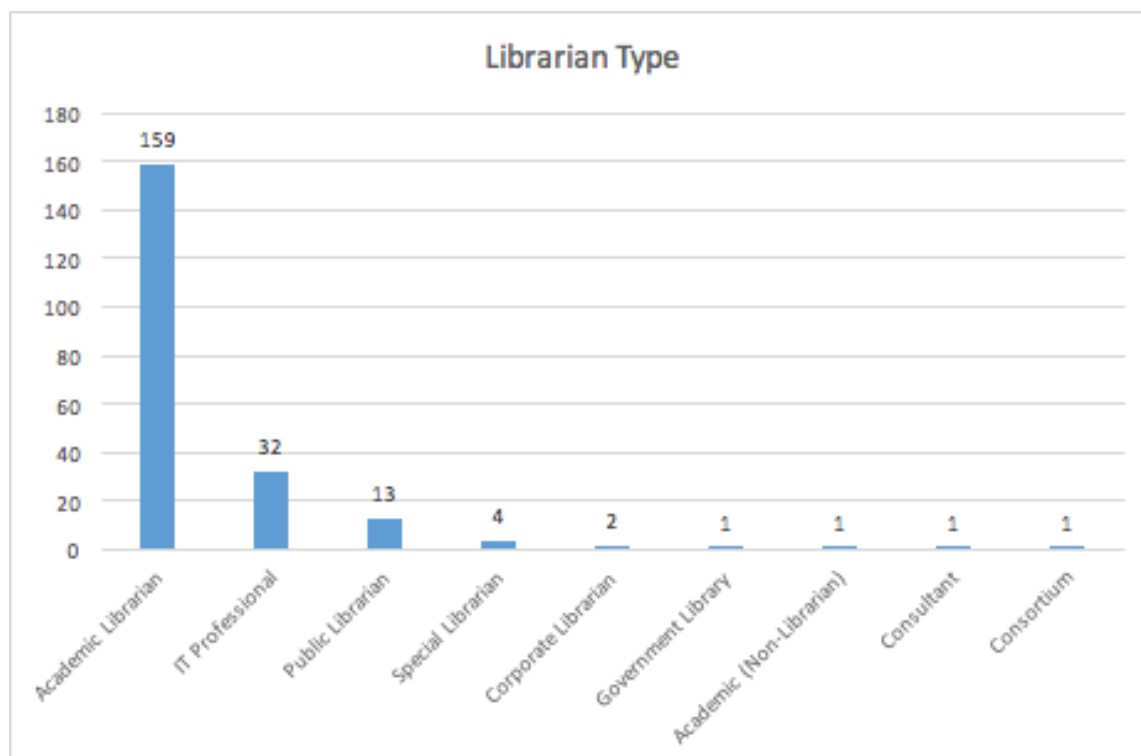
Of the 193 respondents, 82% would appreciate access to recorded sessions after the conference. Live streaming of keynotes and a bundle of streaming presentations came in next at 51% and 44%.

The comments reveal very different thoughts when it comes to online conferences and webinars. Some love it and some hate it. Others understand that, because of logistics and budgets, it is the only way for them to participate. A lot of technologies and ideas were provided.

19. I am a:

The clear majority of participants are academic librarians. Survey takers could select more than one library type, so some of the IT professional also stated what type of library they worked. Sixteen participants stated other, with the majority giving a job title, but also revealed participants work in special, corporate, and government

libraries. Additionally, there was one non-librarian academic, a consultant, and one participant who worked for a consortium.



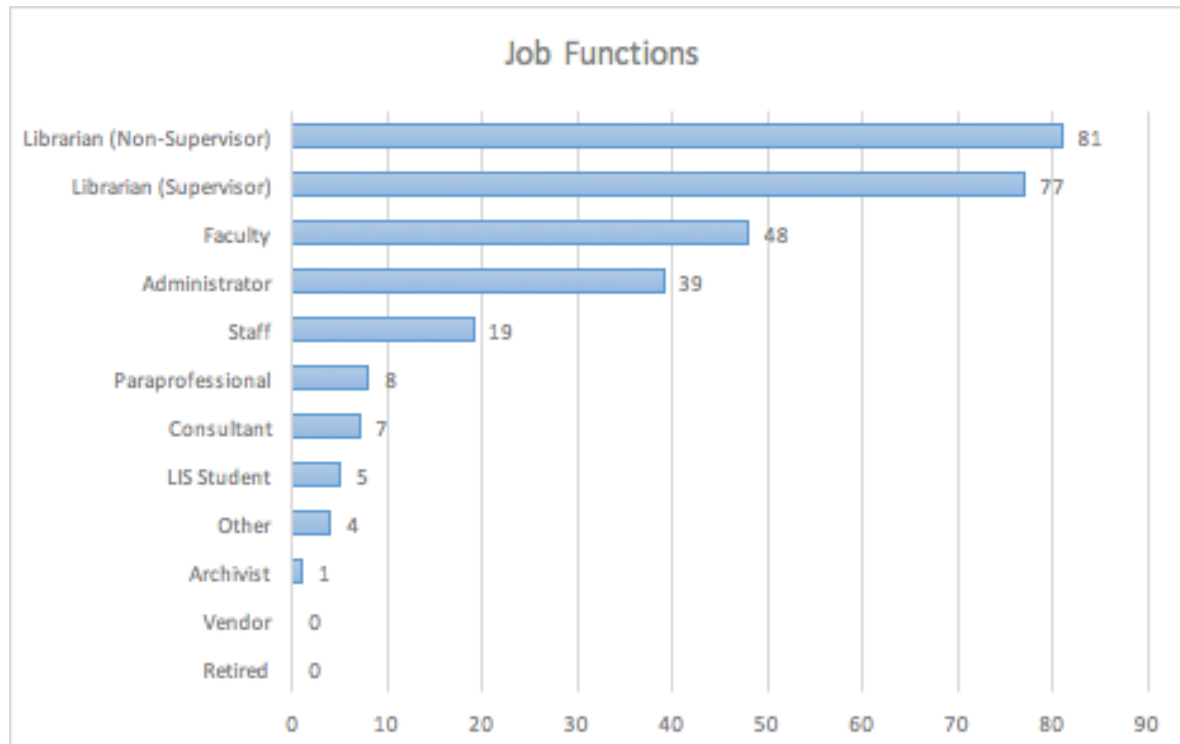
Statistical analysis showed that vendors influenced the attendance of academic and special librarians.

20: Please indicate the job function(s) that most closely match what you do (select as many as apply).

For this question, participants could select as many job functions that they found relevant to their position. The question was designed to align responses to the position types in ALA's membership database, recognizing that these functions often overlap.

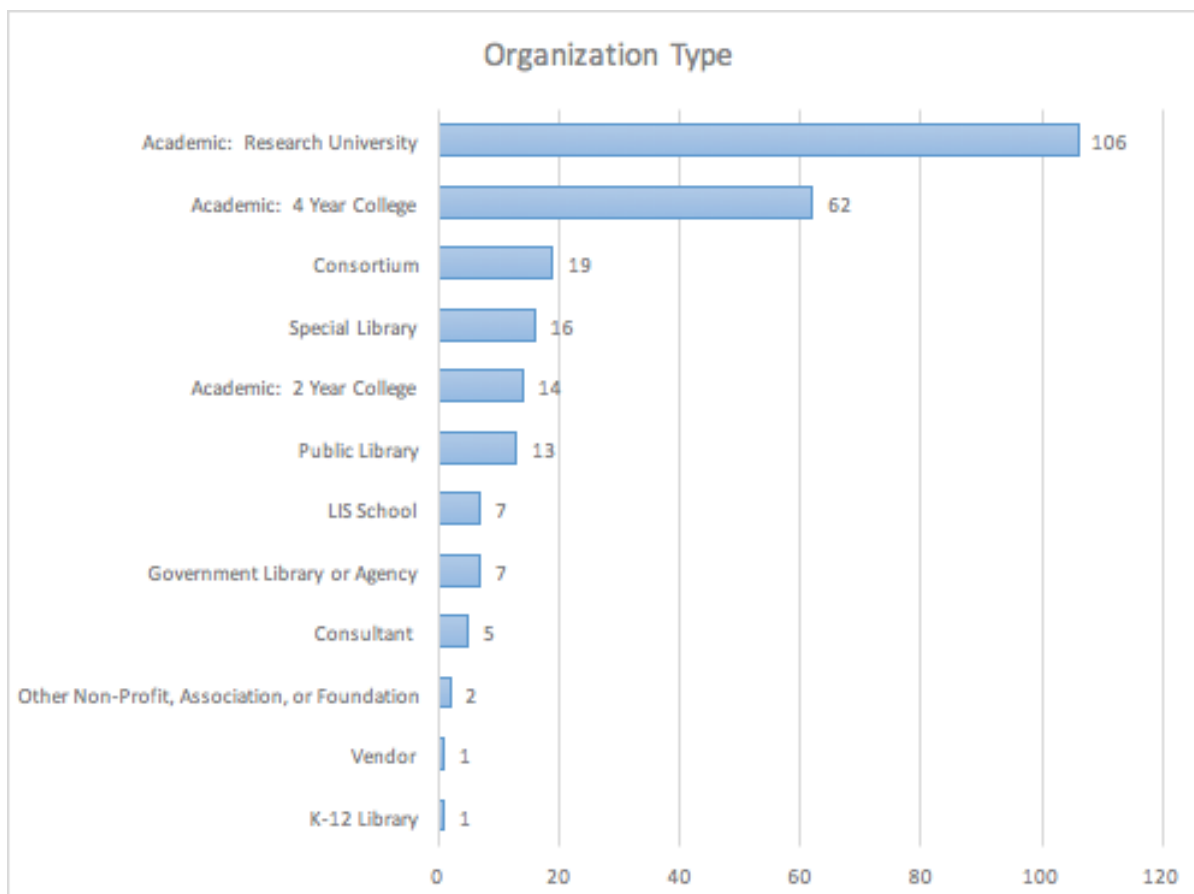
Most survey takers refer to themselves as librarians, approximately half of them are supervisors and half are not. Forty-eight respondents are faculty, which could mean LIS School Faculty or are practicing librarians with faculty status at their institutions. Individuals self-identifying as administrators make up approximately half of those that say they are supervisory librarians. The survey takers did include 27

paraprofessionals and staff, as well as a handful of others. The responses for the “other” category were analyzed, with all in this category referring to themselves as IT, including IT support, systems administrators, and a system engineer.



21. I work in or am affiliated with the following kind of organization (select as many as apply).

Question 21 allowed more than one response, so several participants selected more than one answer. Four year academic institutions and research universities were the majority of responses. However, there were notable numbers of participants from consortiums, special libraries, and two year colleges. There were 10 responses for “other” that are not included on this chart, because all of them also selected an additional organization type and used the other field to be more specific as to the type of library they worked for (i.e. hospital/medical library, regional library system, multi-type consortium, and for-profit education).



22. Please indicated the job titles that most closely match what you do (select as many as apply).

195 respondents provided 388 answers to this question (113 respondents skipped it).

Multiple responses were possible. The twenty most frequent responses were:

Answer	Number	Percentage
Librarian (Non-Supervisory)	62	15.98%
Librarian (Supervisory)	44	11.34%
Technical Support	40	10.31%
Faculty (Full Time)	39	10.05%
Department Head of Manager	38	9.79%
Webmaster	27	6.96%
Cataloger / Metadata Specialist	20	5.15%

Coordinator	16	4.12%
Director	14	3.61%
Department Supervisor	11	2.84%
Assistant Director	9	2.32%
Other -- Also non-faculty	9	2.32%
Support Staff	8	2.06%
Associate University Librarian or Dean	7	1.80%
Associate Director	6	1.55%
Faculty (Adjunct or Lecturer)	6	1.55%
Staff	6	1.55%
Other -- Data Librarian	4	1.03%
Chief Officer	3	0.77%
Library School Student	3	0.77%
All Other Responses	16	4.1%

Appendix E – Analysis of Library Technology Conferences

Conference Comparison Summary December 2016

Melody Condron look a look at other conferences, based on an internal document in her library that included information on what conferences librarians went to and costs.

Cost

Forum seems to be in the middle for conferences. It is not the most expensive or least. Registration is likely not as big of an issue compared to travel costs, which relate to city where the event happens. *It is my recommendation that any discussion of cost look at travel locations rather than registration, which does not seem to be an issue.*

Keynotes

Forum is somewhat unique in the focus on/number of keynotes. There has been negative and positive feedback about the number of keynotes. *This group should discuss whether multiple keynotes are a unique aspect we would like to keep or whether it is a deterrent that keeps us from doing other things.*

Length of Sessions

LITA Forum is not unique in offering a variety of presentation lengths: the 20 & 45 minute slots, lightning talks, plus the preconferences. This makes it possible to have more depth where needed but 45 minutes is still not much for anything to be considered hands-on. Also, if things were hands-on there would need to be table space. Computers in Libraries does something similar (30 & 60), Charleston has 5 different time slots, and many other conferences offer some variety. Some thoughts for the group to discuss:

- *Even if there is a variety of session lengths, is it still valid to keep 2-20 minutes sessions in the same slot? This is more challenging for planning team to match up similar programs, and causes issues if any session drops out.*
- *Do the 20 & 45 minute time slots still meet our needs? Should all be 20 or 45 or some other length?*
- *Do the preconferences make sense and have enough draw, or should they be half-days coinciding with the other sessions? Should there be workshops or more hands-on offerings during the conference that are longer sessions?*
- *Keep lightning talks? Should there be more or fewer lightning talks?*
- *Single track conferences tend to be smaller and then have to cap attendance. Is this something we are interested in?*

Coverage & Focus

This is possibly the most important issue. LITA Forum has not clearly defined what it offers, as far as depth and topics. Code4Lib is for coders. Library Technology Conference is more basic. We tend to have more academics but try to appeal to publics, with mixed results.

- *We need to define what we are, and who we are for.*
- *Should there be more panels?*
- *Should there be more hands-on opportunities? If so, how will we get people to lead these sessions and do more hands-on?*

How Presentations are Chosen

LITA Forum does a familiar “submit your idea” presentation request, and sometimes invites people to submit their presentation. Then, the Forum planning committee decides who will present. This is very imprecise, as the makeup of the forum committee can change what gets accepted. We are also limited by what gets submitted, obviously. Other options for the group to discuss include:

- *Should some sessions be invited and automatically accepted based on subject and need?*

- *Should we consider crowd rating, where participants can vote things up or down? Perhaps they could do this with topics rather than actual presentations?*
- *How we choose sessions and what kind of sessions we want/need is directly related to coverage and focus of the conference--so we need to figure that out first.*

Timing

LITA Forum is traditionally in the fall, and lately in November. Other than being close to Thanksgiving (which may be an issue for some), there are not very many conferences of similar focus around the same time. Charleston is in October and CNI is in early December. Most feedback so far (as well as the conference lists) imply that changing to spring or summer would be a huge conflict. Winter is bad because some people do not want to travel and there are limits to “good” conference cities for winter events. Another issue is the possibility that Forum happen less than annually. ACRL and PLA happen every other year.

- *Fall (particularly November) seems to be a good time for this conference.*
- *Is the length of the conference working?*
- *Why is the conference over a weekend? Does this make sense?*
- *Do the late start on day 1 and the early finish on the last day work?*
- *Should LITA Forum happen every other year? If so, should it be in the off-year for PLA or ACRL? Should it be a longer conference in this case? Should the focus change, such as focusing on innovation and new technology only?*

Appendix F – Matrix Mapping

Introduction

A matrix mapping survey was created (see Appendix 1 for the survey instrument). The list of the 255 LITA Forum registrants' email addresses (as of November 14, 2016) was provided by the LITA office and distributed to two randomly-selected groups. 128 registrants received an invitation to the survey in the pre-Forum group on November 21, 2016; those who had not responded received a follow-up email on November 23. Data collection from those respondents was stopped on November 17. The remaining 127 registrants, the post-Forum group, were contacted on November 14, 2016, with a reminder sent on November 16. Data collection ceased on November 29.

A total of 80 people responded to the survey (30 of 128 to the pre-Forum group, and 50 of 127 to the post-Forum group).

Trends

In the Summary Charts tab, individual rankings are presented on a green background when the ranking is 3.5 or higher and on a red background when the ranking is 1.5 or lower. Most of the highly-ranked items are in the Execution and Depth categories; most of the lower-ranked items are in "Filling a Gap" and "Community Building." This seems to indicate that the mechanics of the Forum are done well, but that more careful planning needs to be done to make the Forum stand apart from the competition and to use it more planfully to build a network.

Observations

Some observation based on responses to specific questions:

Time for networking (Q1) seems to be performing well with new and returning attendees, before and after, though the networking time may not come across as all that unique to LITA Forum.

The keynote (Q2 & Q3) may not fill much of a gap for attendees (looking especially at the post-attendance scores, and the keynote's recording may not be that much of interest to our actual attendees – though it may be of interest to those who couldn't attend [maybe we need a LITA Forum YouTube channel?]) – which may speak to whether they have compelling/inspiring content that we don't get through blogs, etc. Attendees did seem to like the keynoters – or at least felt the keynote is executed well. Perhaps unsurprisingly there's not much perceived community building (should there be?) OR depth to the keynote – maybe keynotes with opportunities for discussion or participation are of interest?

Poster sessions (Q4) aren't hugely key (filling a gap) to new or returning participants – nor do they seem to be key to building community.

The preconference content (Q5) doesn't seem to be winning folks over – and opinions didn't change much in the before/after scores.

Dine-a-rounds (Q6) seem to be supporting (1) good organization by the conference organizers and (1) community building, which makes sense, and folks seem to have a favorable view of them.

Conference sessions & programming (Q7) seem really strong, though folks seem to find them less unique [filling less of a gap] after they've attended them – this is a shame; I imagine we'd want the good rating to stay put or to improve in post-surveys.

Seems like folks felt the Slack component (Q8) was well done and has some potential to grow attendees' networks, though maybe not having a huge overall impact [you'd only be impacted if you get the app & participate].

Uncommons room (Q9) is done well, but not a huge impact, uniqueness, or networking opportunity for attendees [before or after].

Logistics being done well (Q10) is important to our attendees – and they are done well; logistics have strong impact on attendees [before and after].

Sponsors (Q11) didn't seem to come across as unique to attendees, or have much to do with community building – though I guess we could ask: should they be?

Website stuff (Q12) was all pretty strong there – though maybe more options for community building through the website would be useful, or other unique pre/at/post conference features could be integrated.

Inclusion of first-timers (Q13) seems pretty good too – though some dips in the post data for returning attendees – not sure if that means they want more opportunities to build community with newcomers [though that was only one respondent] or the level of depth people are looking for in that regard [and that was 4 respondents].

We think a lot of the data here makes sense, though we know the n isn't terribly high overall, let alone when you break it all down. At the very least, the green and red gives us info to consider in terms of strengths and weaknesses, or what attendees value or value less, and what kinds of improvements or shifts we might make to better spend time, energy, and money for and at Forum.

The raw and summarized data are available in the “[Matrix Map All Responses Raw Data](#)” sheet. This sheet has two tabs: [Data](#) (the raw survey responses) and [Summary Charts](#).

The Summary Charts tab is broken down by question and by demographic of the responder. For each of the 13 features and four categories (a total of 52 measures) we provided, answers are summarized as follows:

- Answers in Category -- total number of responses for that question in that category
- Pre / First Time -- subtotal of pre-Forum respondents whose first Forum was in 2016

- Pre / Returning -- subtotal of pre-Forum respondents had attended at least one Forum before 2016
- Pre / All Responses -- subtotal of all pre-Forum respondents who answered that question
- Pre / No Answer -- number of pre-Forum respondents who did not answer that question
- Post / First Time -- subtotal of post-Forum respondents whose first Forum was in 2016
- Post / Returning -- subtotal of post-Forum respondents had attended at least one Forum before 2016
- Post / All Responses -- subtotal of all post-Forum respondents who answered that question
- Post / No Answer -- number of post-Forum respondents who did not answer that question

In each category, the number of first-time and returning ratings do not add up to the total number of ratings because some respondents did not answer the question about how many Forums they had attended.

Survey Instrument

The LITA Forum offers a number of opportunities to learn from, network with, and communicate with your peers. We are curious to know how much value you receive from each of these opportunities. Please indicate on a 4-point scale (ranging from "none" to "a great deal") the value you personally receive according to each of these four criteria.

If you have questions or comments, please send them to Ken Varnum <varnum@umich.edu>.

1. How many LITA Forums have you attended (as of the time you are taking this survey)? Please enter a number from 0-19.

2. Please rate each of the following features of the LITA Forum according to **Excellence in Execution**, that is, is this feature done well? If you did not take part in one of these features, please skip that line.

	Done Very Poorly (1)	Done Poorly (2)	Done Well (3)	Done Very Well (4)
Time for Networking with Colleagues (1)	m	m	m	m
Keynote speakers (2)	m	m	m	m
Recording of keynote (3)	m	m	m	m
Poster sessions (4)	m	m	m	m
Preconferences (5)	m	m	m	m
Dine-a-rounds (6)	m	m	m	m
Conference sessions/programming (7)	m	m	m	m
Slack backchannel (8)	m	m	m	m
Uncommons Room (9)	m	m	m	m
Logistics, e.g., hotels, meeting spaces, WiFi, food, local restaurants (10)	m	m	m	m

Sponsors, e.g., how Forum deals with vendors (11)	m	m	m	m
Website/online support for Forum, e.g., wiki, program, changes (12)	m	m	m	m
Inclusion for first-timers (13)	m	m	m	m

3. Please rate each of the following features of the LITA Forum according to **Depth**, that is, does this feature have a strong impact on me? If you did not take part in one of these features, please skip that line.

	No Impact (1)	Little Impact (2)	Some Impact (3)	Strong Impact (4)
Time for Networking with Colleagues (1)	m	m	m	m
Keynote speakers (2)	m	m	m	m
Recording of keynote (3)	m	m	m	m
Poster sessions (4)	m	m	m	m
Preconferences (5)	m	m	m	m
Dine-a-rounds (6)	m	m	m	m
Conference sessions/programming (7)	m	m	m	m

Slack backchannel (8)	m	m	m	m
Uncommons Room (9)	m	m	m	m
Logistics, e.g., hotels, meeting spaces, WiFi, food, local restaurants (10)	m	m	m	m
Sponsors, e.g., how Forum deals with vendors (11)	m	m	m	m
Website/online support for Forum, e.g., wiki, program, changes (12)	m	m	m	m
Inclusion for first-timers (13)	m	m	m	m

4 Please rate each of the following features of the LITA Forum according to **Filling a Gap**, that is, does this feature provide something I cannot obtain easily anywhere else? If you did not take part in one of these features, please skip that line.

	Not at All (1)	Some (2)	A Lot (3)	Only at LITA Forum (4)
Time for Networking with Colleagues (1)	m	m	m	m
Keynote speakers (2)	m	m	m	m
Recording of keynote (3)	m	m	m	m
Poster sessions (4)	m	m	m	m
Preconferences (5)	m	m	m	m

Dine-a-rounds (6)	m	m	m	m
Conference sessions/programming (7)	m	m	m	m
Slack backchannel (8)	m	m	m	m
Uncommons Room (9)	m	m	m	m
Logistics, e.g., hotels, meeting spaces, WiFi, food, local restaurants (10)	m	m	m	m
Sponsors, e.g., how Forum deals with vendors (11)	m	m	m	m
Website/online support for Forum, e.g., wiki, program, changes (12)	m	m	m	m
Inclusion for first-timers (13)	m	m	m	m

5 Please rate each of the following features of the LITA Forum according to **Community Building**, that is, does this feature help me increase my professional network? If you did not take part in one of these features, please skip that line.

	Not at All (1)	Some (2)	A Lot (3)	Only at LITA Forum (4)
Time for Networking with Colleagues (1)	m	m	m	m
Keynote speakers (2)	m	m	m	m
Recording of keynote (3)	m	m	m	m

Poster sessions (4)	m	m	m	m
Preconferences (5)	m	m	m	m
Dine-a-rounds (6)	m	m	m	m
Conference sessions/programming (7)	m	m	m	m
Slack backchannel (8)	m	m	m	m
Uncommons Room (9)	m	m	m	m
Logistics, e.g., hotels, meeting spaces, WiFi, food, local restaurants (10)	m	m	m	m
Sponsors, e.g., how Forum deals with vendors (11)	m	m	m	m
Website/online support for Forum, e.g., wiki, program, changes (12)	m	m	m	m
Inclusion for first-timers (13)	m	m	m	m

Appendix G – Focus Groups

Forum Attendees Breakfast

Number: 3

Demographics: first-time attendees (2 academic, 1 public)

Main Points:

- “Forum” captures things well -- it’s a conversation, community thing, not a presentation
- “LITA” as a name is off-putting; libraries *are* inherently technology
- High value planning committee places on comfort/inclusion is a big plus
- Forum is a good size (overall and for concurrent sessions)

Forum Attendees Lunch

Number: 9

Demographics:

Main Points:

- Forum is not just a conference
- Focal point for community building, but not much beyond the in-person annual event
- Needs more self-organized interest groups or birds-of-a-feather session, active informal participation by presenters, keynotes, and attendees a strength

LITA Past Presidents

Number: 6 in group; 1 answered questions via email

Demographics: Past Presidents of LITA over the past 10 years

Main Points:

- We need to figure out our identity
- Don’t attend because their interests are more managerial; no longer hands-on tech
- Can we sustain a conference that people grow out of?
- Need more on management, transition to management

- Should we partner with other divisions and their conferences?
- Networking is what is useful about Forum; that's the only reason they'd go
- Networking is strong, need more activities to encourage mingling and interaction (conference Bingo mentioned)
- Building community is hard and involves a big time commitment, but LITA can do better
- LITA Forum name is a recognized brand after 20 years
- Easy to fly to, rotating (3?) cities for location
- Keynotes--some like having outside big names, others want more up and coming librarians
- We may have too many keynotes
- Too much focus on social justice keynotes recently, need more tech

Past LITA Forum Chairs

Number: 7 in group; 1 answered questions via email

Demographics: Former LITA Forum Planning Committee chairs over the past 10 years

Main Points:

- Most believed Forum not future focused (needed for managers); 1 didn't go due to costs; 1 has recently started attending after lapse because it has become more future focused
- Registration fees not an issue; cost of travel is
- All agreed to chair because they wanted to make Forum better & increase communication between LITA groups; 1 cited promotion/tenure
- LITA Forum was a "silly name"; perhaps LITA Information Exchange?
- Calling it a conference may run into overhead cost issues with ALA
- Need better community--developing it before Forum and continuing it after
 - Keep personal feeling with post-communications, such as send out personal emails from leadership to non-members
- Focus on networking and communication; have reception be more like Happy Hour

- Assign seats at lunch to encourage communications among different groups
- Get groups together (i.e. public librarians) early in the conference so they get to know each other
- Have Forum be every other year, with the off year do something new, like a virtual conference
 - In off year, have more education, publishing of conference projects
- Pick one place for Forum and have a multi-year deal
- Have Forum be adjacent to another conference, like Code4Lib
- Mixed feelings about keynotes--some want bigger names, others want library strategic thinkers
- Change start time (not noon)

Past LITA Board Members

Number: 4 attendees

Demographics: Former LITA Board members from the past 5 years

Main Points:

- Forum is better for those who are new to their jobs as opposed to managers. Code4Lib and other conferences are better focused on topics of interest. Networking is the best aspect of forum
- No recruitment is done at forum and we are missing a huge opportunity to attract new members and it's not about encouraging people to join or get involved it's mostly an opportunity for local folks to attend a conference that's close to them. Not sure how a name change would help or what to change it to
- Better vetting of presentations is needed both in terms of content and style. Too many intro-type sessions i.e. "What is user experience". Need tracks first then presentations, not the other way around. Need better collaboration between forum planning group and would need a "forum experience" group
- Format is not good either-better to have a conference over weekdays as opposed to weekend. Also f2f is not so important for the presentations themselves, but for the discussion that follows

- Is it worth having better programs at the bigger conferences?
- Keep momentum going after the conference-not sure how to do this

Research Library Librarians

Number: 4; 3 in an online session; 1 via email

Demographics: 4 (all previous attendees)

Main Points:

- Suggested tagline for Forum: “engaging with libraries and technology”
- Forum’s purpose should be to learn about new/cutting edge technologies & implications, not case studies
- Streaming of keynotes and sessions would be great
- Why is Forum only annual? Should be more often, should be more events between Forums.
- New attendee session very valuable. Should be for all attendees.

Public Librarians

Number: 7; 4 in an online session; 3 via email

Demographics: 3 LITA members

Main Points:

- There is definite interest in Forum attendance from public librarians. Until this year, they saw it as academically-focused. Suggestions: public library track, soliciting public librarians for programs
- Make LITA the year PLA is not meeting
- Practicality of the Forum is one major reason to attend
- No issues with the name; “forum” denotes the discussion & networking that happens
- Many public librarians are members of PLA; paying for a second ALA group is not possible or sometimes desirable
- More structured Birds of a Feather sessions, e.g., at a restaurant or in a room with no competing sessions. One for public librarians or for librarians that work in same geographic area

- Size is its biggest advantage; don't want a really large conference
- Like that Forum includes keynotes and programming that include ground-breaking themes
- Themes are important - both for submitting programs and for deciding whether to go.

Special Librarians

Number: 2, both via email

Demographics: 2 members, but one was a first-timer

Main Points:

- The name meant nothing to the first-timer. "Library technology" means little in today's profession.
- Lightning talks a highlight, but maybe not the place to continue a presentation from a previous session
- A low or very low registration cost would make a big difference in determining if they would come to the Forum
- Would be difficult to justify this and other technology-related conferences; not sure if there is a place for general conferences.

Vendors

Number: 2,1 via email

Demographics: 1 vendor from major library company, 1 vendor from smaller company geared towards public libraries

Main Points:

- They want an active role; been frustrated their sessions aren't accepted; need clearer roles as to how vendors can present
- Want attendee list
- Want to know more about who attends before committing to sponsor
- Does like to sponsor smaller conferences
- Want to have a list of sponsorship items with prices (reps); she sees it as more of a conversation

- Needs better communication with organizers