**Comments on proposed unit restructuring from Janice Keeler, Jan. 11, 2020.**

Before any restructuring is actually implemented, I think a number of issues need a lot more thought, more data, and more clarification:

**Logical inconsistencies and undocumented assumptions**

1. **Why should we drastically reduce association activities and the potential value of SLA membership for all because an unspecified number of units are having trouble staffing volunteer positions?** The restructuring proposal lists only two objectives for SLA: “creating cutting-edge programs and building opportunities to connect with like-minded colleagues about emerging trends and best practices.”
   1. **If all SLA members are members of all units, the units no longer contain only “like-minded” individuals in the same geography, industry or professional role. This may dilute unit value and interest in involvement.**
   2. **Many units have been doing other activities, including (but not only) newsletters, student outreach programs, awards programs, websites (some with resource pages) and providing stipends for conference attendance. Will all those activities just be dropped?** Many of these activities provide resources and support for members, and the volunteer activities related to the current variety of board and committee work provide important learning opportunities. During my own career, I’ve had the opportunity to learn budgeting and financial software; do event planning; get experience writing articles; manage meetings as Chair and President; and many other things that I had not yet done in my paid job. It’s a shame to deprive members of these services and learning opportunities to solve a problem for a few units.
2. **On one call, a statement was made (with no details) that relatively few members currently join multiple units and the restructuring would add value by making membership in all units free. There are two undocumented assumptions here:**
   1. Assumption 1: Despite the “evidence” that most people do not currently join multiple units beyond their two free ones, the restructuring proposal assumes that membership in all units would be of interest to members. I do not think this is true, especially for the industry-specific units or chapters.
   2. Assumption 2: The current nominal charge per unit deters membership, which is the justification for the proposal to charge nothing for unit membership in the restructuring. Given SLA’s financial problems, I don’t see why it makes sense to eliminate any type of revenue stream, however small. If somebody can afford $200 for dues they can probably afford 5.5 cents per day ($20/365) for additional units, especially if employers are paying dues. I personally was a paid member of four additional divisions (beyond the free one) and two caucuses for the last several years, even when I paid myself. I know I’m not the only one among members of my acquaintance to pay for at least one additional unit. The recent $10 per unit cost offered at the conference makes units even more affordable.
   3. **Recommendation:** Provide actual data to all unit leadership on the historical trends (at least 5 years) in the number of members who join 1,2,3 or more units besides their free ones, and document the counts of paid membership per unit.
3. **Members already have access to the Open Forum, where they can ask questions of the entire SLA membership, and where units can post invitations to their events. This seems to already provide as much benefit in terms of “all units” as needed by most members.** The issue of whether units charge non-members for their events is separate, because these charges are nominal, and part of the overall problematic financial framework SLA currently uses. I can address what I see as financial problems separately if anybody is interested.
4. **The assumption seems to be that opening all units to all members would be fine with our vendor partners, but have we asked if they have any concerns?** Currently, many vendors pay to market to specific units because those people are potential customers, but if many SLA members are members of all units, it would be difficult for partners to see their real target audiences. Partners would have to spend more for paper mailings (which some still do), for a diluted result. Will “communities” need tiered membership to differentiate between people actually relevant and those who are just interested?
5. **One of the supposed justifications for “simplifying” the structure was that some members don’t know they can currently join a chapter and division for free. This is a failure of SLA’s communications to potential, new, and current members, not an argument for restructuring.**
   1. **Chapters** – **Recommendation:** I think new members should be defaulted to membership in the local chapter of their work address, but be given explicit information about how to add or change chapters. Chapters should be notified of new members in their area so they can reach out.
   2. **Divisions and caucuses** – First of all, the “Get Involved” menu option on the SLA home page is not clear about including unit descriptions – it sounds as though it is seeking volunteers, which is more than a new member may want to do. In any case, if people do click on “Get Involved” and then click on Divisions, they can see a list of division titles and sections, but no descriptions. Clicking on the link for a specific division goes to the unit website, which may or may not have a description of what they do on their home page. It would be a lot of work to click through each division and section link and try to figure out what they all do, which may be why some people don’t make a selection. **Recommendation (with or without restructuring!):** Add scope notes to the unit descriptions on the main Divisions page, as well as the links to unit sites, to give an easier way to review unit options. Make sure to send the link to the Divisions and Caucuses pages to new members and explain their options.
6. **The proposal seems to assume that calling all units “Communities” is clearer than the current names, but I disagree.**
   1. Chapter is a clear and standard term for geographic groups of association members. I think it’s important to distinguish between these and other types of units.
   2. **Recommendation:** Perhaps instead of calling all units the same thing, effort should be made to consider the definitions and names of divisions, sections and caucuses. I think there is a difference between the industry divisions and the functional/role-based divisions across industries.
7. **There is a logical disconnect between allowing all members to be part of all “communities” for free and allowing units to opt in or out of the proposed restructuring**. If they opt for status quo they should retail their treasuries and unit dues so they can provide the services they are currently providing. If that’s not the plan, this is a huge point that needs clarification.

**Points needing significant clarification**

1. **We are told that the restructuring will drop unit membership fees, while somehow more staff time at HQ will be found to manage “community” websites and do centralized treasury work. Is this realistic, given the low level of current staffing? If staff time will be added, how will this be paid for, especially after dropping unit dues income?**
2. **The proposal shows only three volunteer “positions”, but with no definitions or details.**
   1. What are the definitions for the three “roles” in the proposed restructuring?
   2. Are there defined term lengths?
   3. How do the individuals get selected with no nominating committee?
   4. How do people learn what do as the “convener” if they don’t have a year as convener-elect to learn the ropes? What does the convener convene?
   5. Why would a membership chair be relevant if there is no financial impact of added members, and the only services are a discussion list and programming? Who cares how many members there are in that context? Wouldn’t a communications chair to coordinate the discussion be more relevant?
3. **Why is such a massive change being considered without surveying at least unit leadership, if not all members?** Expecting people to provide random individual input on the existing proposal is not a serious way of getting actionable feedback. At least, if units will have the ability to opt out of restructuring, shouldn’t we find out how many are tentatively planning to do so?
   1. **Recommendation:** If a survey is done, please do it according to best practices for surveys, and not with such a misleading effort as the 2019 name change survey, which asked a single theoretical question about the ideal name and then interpreted the results as requesting a name change, which is a completely different thing.
4. **Why is there “urgency,” as Hal expressed on his last call, if the proposal is primarily about simplifying unit structures?** Given the serious delays in distributing unit allocation checks, it seems the urgency may be financial. If financial concerns are the true issue, I think this should be expressed and considered in detail as a separate matter from unit restructuring.
5. **What happens to chapter and division cabinets?** I agree they should be much less bureaucratic in operation, but I think they are important links between units and the SLA board.
6. **What exactly happens to unit money if it is all centralized?** Do units retain control but SLA does the bookkeeping and check writing, or does SLA just take it all over and the units have no ability to pay for photocopying, local event costs, etc.? There has been no clarity on this at all.

**Recommendation: Consider simpler/existing alternatives to the problems mentioned in discussing the proposed restructuring. For example:**

1. **Some units are having trouble getting volunteers**
   1. **Restructuring proposal: radically reduce unit services and volunteer roles for all units, even if they are not having trouble getting volunteers**
   2. **Existing/alternative solutions:** 
      1. We have a history of individual chapters and divisions merging with others if they cannot continue. Also consider a process to allow units having problems to become caucuses instead and have caucus membership be free. Change the name of caucus to something like special interest group, because caucus sounds political. Existing caucuses are much like the proposed “communities” in the restructuring, usually a program or event at the conference and a discussion list.
      2. Allow flexibility in the number of elected unit board members, so each unit can decide how to staff the roles of Chair/President Elect, Chair/President, Secretary and Treasurer. Past Chair/President could be optional, but the Elect role is pretty important to get the next chair up to speed enough to be effective. Secretary and Treasurer could be combined for small units.
      3. Allow unit flexibility in the number of committee chairs based on the number of services they want to offer. Some units may be able to support a newsletter or website, and this should be up to them.
2. **Three Year Terms are hard to fill**. This was mentioned on one of the restructuring calls and doesn’t seem to be addressed in the restructuring document because there are no details on the terms for the proposed positions. Comments:
   1. See 14 b. above – past-chair/president could be optional, decided by each unit
   2. Conversely, if somebody wants to be in a committee chair role for more than three years and nobody else is volunteering, why set an arbitrary three year maximum? The Chair always has the option to name a new chair each year.
   3. This issue was raised in terms of SLA Units, but I think that it applies even more to the overall SLA Board. I think those terms should all be limited to two years, except maybe President, which might make it easier to get candidates.
3. **There is too much bureaucracy in Treasurer Roles** 
   1. **Restructuring proposal: Consolidate unit treasuries into SLA HQ and eliminate Treasurer roles. [I think these are two separate issues.]**
   2. **Recommendations:** 
      1. **If SLA is short of money, units could be asked to contribute toward key projects (as done several years ago), or, allow units an option to pay future registrations for Leadership Symposium and speaker rate AC registrations, at 2020 rates, but with the option to name the persons for those registrations any time for the next four years.** Thus, SLA could get an influx of cash now and units could get the benefit of current rates. If twenty units paid $395 each for ten future registrations, that would be almost $40K for SLA right now, and potentially much more. Other creative options could be discussed.
      2. **If treasurers are hard to find, eliminate the unnecessary bureaucracy but not the role.** Even if unit treasuries are “centrally managed”, somebody in each unit will still be needed to deal with money. I have been a unit treasurer three times. The first time, we just managed our own books and sent HQ an annual audited financial report. In the two years I’ve been treasurer ending last month, the bureaucratic requirements have grown significantly. First we had to submit bank statements to HQ monthly. Then we were told to also submit bank reconciliation reports, although these communications have been inconsistent on frequency of monthly, quarterly or annually. We still have to find an auditor to audit the books even though SLA has all the information needed to do the audit centrally, and could pull any report it needed because the treasurers are required to manage their records in QuickBooks on the SLA accounting firm’s server.
      3. In terms of bank statements, units might be happier to use SLA’s central bank and give SLA online access to their statements if it were not Wells Fargo, which only operates in 37 states and has no international small business services. My primary unit uses Bank of America, which is in all 50 states and international, so wherever our treasurer is, they can most likely get to a branch. It is important to have access to a physical branch for the transfer of signatory rights.
      4. **Recommendation:** Limit volunteer treasurer responsibility to the following:
         1. Budget preparation with unit board (which is a learning opportunity for all involved)
         2. Provide simple reports to unit board meetings (which don’t necessarily have to be monthly; that should be up to the unit).
         3. Pay bills and reconcile bank statements (which is done online at the SLA accounting firm’s server so they can presumably access the reconciled statements as well as all data). This is not a big deal for most units now that we’re not doing vendor sponsorship and conference AV costs; there are only a handful of checks per year.
         4. Submit bank statements and Treasurer’s unit board reports to HQ annually (or maybe quarterly). It seems unlikely there is staff time to review the currently required monthly submissions from all units.
      5. **Recommendation:** Since unit treasurers have to record their transactions in Quickbooks on the SLA accounting firm’s server, the firm should pull all required reports as needed and conduct the audit instead of asking volunteers to do that.
4. **There is too much bureaucracy in Webmaster Roles**

**Recommendation:** Recognize the difference between the technical aspects of webmaster and the content management aspects. Since SLA/MCI laid off the only IT person, how will somebody manage all the “community” sites without added cost? And how would a central IT person know what content to post on the sites? I agree that centralized IT support for the websites would relieve a lot of stress on units, but that doesn’t solve the need for content management.

**My Concerns**

1. **I think this restructuring is an overly drastic solution to some specific problems, most of which have less drastic solutions available.** Change and simplification can be good, but not at the cost of losing so much of the value of membership. If SLA just becomes set of discussion lists in Connect (which is a TERRIBLE tool) plus a conference, why should people continue to pay the overall membership dues? If it’s to be more than that, several more volunteer roles and services are important.
2. **I think the real burning issues are not the structure or the association name, but the following issues:**
   1. **Volunteer Engagement:** We need to focus on making volunteer roles more appealing by stressing the personal experience value, by removing unnecessary bureaucratic requirements, and by offering small tasks as well as annual commitments.
   2. **Annual Conference (AC) Substance –** SLA has talked for years about recruiting members in roles other than traditional research and library management. The annual conferences from 2017-2019 offered great programs, but each offered a total of 10.5 hours of actual presentations across three days, and even less that was relevant to members not doing research and library management. I think the attendance drops and potentially related membership drops are due to the reduced value many people and their employers perceive in such a schedule. I think members in any role need to see at least a half-day’s-worth per day of work-related content to be able to justify attending, whether they or their employers are paying. I think this is one of the single most critical problems SLA faces, and it really needs to be fixed. If we cannot offer substantial programming (with appropriate different skill levels) for EACH role, including non-research role like taxonomy, digital asset management and content buyers, we will never be able to grow membership. Given declines in traditional roles, more growth opportunities may be possible in these “newer” roles than in traditional library research roles. There is a global taxonomy discussion list with over 4,000 members, but we can’t attract these people to the AC by offering two or three taxonomy sessions a day.
   3. **Chapter Offerings –** When I joined SLA, my local chapter had eight in-person program meetings, one holiday party and sometimes a summer social event each year. Those days are long gone, but some in-person meetings are still important for SLA loyalty and networking as well as content. Perhaps instead of thinking chapters are the same type of “community” as divisions, we should retain the clear geographic chapters (even if borders shift based on membership) and encourage them to have at least quarterly programs or events in person outside of working hours. Regional conferences could be encouraged as well.
   4. **Communications to non-members as well as members:**
      1. **Communicating the value of information professionals to employers to stem the reduction in jobs**. SLA has always been very poor at this, but I think it’s a very important responsibility of SLA that should not be overlooked.
      2. **Communicating what SLA does and what types of members we have**. The name is not the main point; we have to communicate the rest as well.