



American Association of Law Libraries
MAXIMIZING THE POWER OF THE LAW LIBRARY COMMUNITY SINCE 1906

Observations & Recommendations

American Association of Law Libraries

October 2011

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EXECUTIVE SUMMARY

AALL has a successful Annual Meeting with strong loyalty, especially from the Academic Law Librarians. Some of the positive attributes that we observed include:

- Lots of hallway hugs
- A surplus of volunteers
- Members who are passionate about their profession
- Healthy support from large exhibitors and sponsors
- Attendees value thought provoking keynote speakers

The Annual Meeting offers greater networking than educational value...especially for the seasoned professional that desires sessions with advanced learning. Many regular attendees go to sessions more to show support for the people they care about, than for the education. Sessions are often comprised of panels with little to no audience engagement. Common attendee complaints include:

- session content was too basic
- needed more time for this session
- presenters were not engaging or read their slides

Creating Education Differentiation

The knowledge gap between presenter and attendee has shrunk. Your attendees are smarter than ever and need to be challenged more with advanced learning opportunities. The bar for paid education offerings is being raised. To paraphrase Seth Godin, members will pay for content that:

- 1) they can't get somewhere else
- 2) is delivered first
- 3) brings them closer to a community that they value

In order to achieve these value drivers, AALL must design learning opportunities that are participatory and include brain-friendly adult learning principles. AALL's education must be considered cutting edge and unique. Your participants want sessions that include advanced content that is narrower in focus and led by presenters that will guide them through how to apply the content. They also want content that will help them solve their problems and challenges. They enjoy topics around new technologies that can be applied in the work place.

We believe that AALL needs to improve the process (including removing the politics) for selecting and designing the conference content. Moving the deadline for the Call for Proposals back a few months will help encourage more submissions with newer content. Adding more sessions after the initial marketing push, will allow the committee and staff to continue to locate the latest and greatest content and presenters plus provide a new marketing message.

The role of the Annual Meeting Program Committee needs to become much more strategic. We've included a number of recommendations to consider. Probably the single most important is for the AMPC to provide input, feedback and advice about big ideas, issues and topics that apply to AALL's primary audience segments. The more the AMPC can focus on the learner vs. presenter or sponsoring SIS the better!

AALL will need to invest in their presenters so that they can deliver participatory or more advanced sessions. We recommend that you train, coach and evaluate speakers on content design, delivery and visuals. Your investment in this area will have a long-term payoff. Subject Matter Experts (SMEs) are experts in their subject field, not experts in presentations. In order for AALL to differentiate itself from its competitors, investing in presenter training will have huge benefits and long term results for the Annual Meeting.

Another way to focus on quality over quantity is to design more keynote or general sessions. A more focused Annual Meeting, designed and threaded with content that helps solve some of the most significant problems for attendees, is better received than a conference with a buffet of offerings that doesn't connect the dots for the learner. The AALL AMPC must take a more intentional approach to semantic threading of content topics and issues to be successful in the future.

Improve Focus on Goals of the Annual Meeting

First time attendees are overwhelmed by the number of choices, lack of educational tracks and endless list of committee meetings that don't apply to them. They don't understand the difference between an AMPC and SIS session. It's difficult for them to break in and become part of the clique.

Regular attendees that are active in AALL committees or SIS's are running from meeting to meeting and don't fully participate in the education offerings. Many spend very little time on the expo floor. The regular attendees who are active volunteers are exhausted after four full days!

We recommend that the AALL Board carefully review and articulate the primary goals of the Annual Meeting. We believe that much of the SIS committee work can be done outside the Annual Meeting, virtually. Having all participants engaged in improving and participating in the education and conference networking will help advance the profession more than small group committee meetings.

Tightly Define Primary Audience

AALL is a very democratic and caring organization. Past decisions to allow each SIS to have an equal voice seemed fair, but has created a political, splintered membership. The AALL Board should carefully consider who the primary audience that needs to be served is and design an experience that can't be beat. Later in this document, we've made recommendations for primary segments. Beyond a SIS census, we recommend that the filters used to define your primary audience include:

1. Competitive alternatives in the marketplace (SLA, ILTA)
2. Buying authority (exhibitors/sponsors keep conference fees in check)

Closing Thoughts

This is a long read and includes quite a bit of tactical advice for technology, marketing, exhibits/sponsorships, etc. We recommend that the AALL Board focus primarily on making long-term improvements to the conference education. We truly believe that sustainability and growth are primarily dependent on improvement in education value.

Prior to digging into the report, we recommend reading Attachment A, B and C towards the end. These documents provide a good primer for the latest adult education science and best practices. Having this baseline knowledge will be helpful as you dig into the recommendations.

Annual Meeting Conference Education

Why People Attend Conferences

The top two reasons people state for attending conferences and events is **networking and education**. Suppliers list **getting new leads and doing business** as their top two reasons for attending conferences.

According to ASAE's research for *The Decision To Learn*, people rate **professional development and education**, second only to **access to up-to-date information**, as the most important role the association plays in their industry profession. Learning is what drives people to join an association and attend conferences. Sharing the latest information and research is best delivered through online or print channels and is easily copied by the competition. Limit valuable good learning opportunities at a conference and you'll reduce your attendance and membership value will decline.

According to *The Decision To Learn*, the **driving extrinsic motivation** for adults to learn is to **increase their job status** which then increases their income and social standing in their chosen profession. When AALL is viewed as being helpful in this area, you'll build lasting loyalty (especially for Private Law Librarians). Knowing the latest research and how to apply it opens up new opportunities for career advancement. Learning, not information, is important to a better life.

The driving **intrinsic motivation** for adults to learn is a **general sense of accomplishment**. In order to feed their personal passions about subjects that they have limited knowledge or experience, adults want solutions to their real-world problems and issues. They desire solutions that improve their companies or their professional condition. And they want those solutions provided in provocative learning formats, not the standard boring talking heads.

Since learning is the primary driver of attendance at a conference, associations must tap extrinsic attributes in ways that will engage professionals intellectually as well as address their job and career needs. Conference planners must connect their attendee's strong desire to learn with their preferences for programming that will increase their cognitive engagement and learning accomplishment.

Without an intentional focus on the learning needs of its attendees, AALL will struggle to attract and retain a loyal, sustainable growing audience.

Taking ASAE's research in mind, it is important that AALL focus on improving their education and professional development options for its participants. Currently AALL's education endeavors are focused heavily on information transfer from a lecturer (or panel) to an audience. Information transfer is not education or professional development. Improving education and content needs to be priority one for building a sustainable AALL and to differentiate itself from the competition. The education program should be designed in such a way that attendees become active participants instead of listening to a lecture or panel of talking heads.

AALL Current Conference Education Approach

There are a number of challenges that exist with AALL's current methodology and related processes for identifying and scheduling education for the Annual Meeting. Here is a general overview of the processes and their challenges. Each of these will be addressed at length in the recommendation section.

1. **Conference Goals and Audience** - Currently AALL is trying to serve all of its members' interests and each of the SIS with programming at the Annual Meeting. AALL staff and AMPC follow the Guidelines for Annual Meeting Program Planning which states that there should be something for everyone within the framework of the entire annual meeting. The focus is on diversity of options including allowing all SIS to offer programming.

Challenge - AALL and AMPC are trying to be all things to all people. The primary goals of the Annual Meeting are eclipsed by trying to offer too much content.

2. **Politics** – There are two political challenges with the current conference speaker programming:
 - a. Selection of proposals and speakers by AMPC
 - b. Speaker programming by SIS

Challenge - Personal agendas, favorites, personal likes and dislikes, and the lack of clear understanding or experience with how adults learn are hampering the selection of the best programming for AALL audience. The SIS committee meetings and programming at the annual meeting have created splintering factions, SIS fatigue where leaders have to attend too many meetings instead of conference education, and AALL's own competing forces.

3. **Timing** – Submission and selection of conference programming is done far in advance of the conference start date so staff has adequate time to market and plan logistics.

Challenge - Conference content is planned too far in advance to be relevant and current.

4. **Effectiveness vs Efficiency** - The entire speaker selection process has been designed so that AMPC and staff can meet specific deadlines for marketing and program scheduling. The current speaker selection process is about efficiency of speaker logistics and sessions. It is planning- and speaker-centric, focusing on the needs of the speaker.

Challenge: The focus is on efficiency instead of attendee effectiveness. The speaker and sponsors' needs are put above those of the attendees and learners. A shift needs to occur that focuses on being learner-centric first.

5. **Conference Content** – AALL staff and AMPC tries to allow all constituent groups to plan programs and activities that they believe will be useful to members and others. The Call for Proposal process is used to identify programming and speakers. All SIS are also allowed to plan, schedule and present content during the conference.

Challenge: Selecting programs only from proposals, leaves the content design up to chance. Without intention to content strategy, the conference schedule has the potential to lack what the attendee or learner needs most. Assuming that the members are looking out for the best interest of all the members is a false assumption.

6. **Quantity** - AALL is trying to be all things to all people offering a wide variety of programming.

Challenge: This creates a vanilla offering that is wide and shallow, lacking quality and depth. New attendees are confused by the number of offerings. AALL needs to start focusing on quality and not quantity.

7. **Good Adult Learning Best Practices** –The AMPC Guidelines For Annual Meeting Program states that AMPC should provide a balance of formal education programming and meeting opportunities.

*Challenge: Most of the Annual Meeting conference programming are lectures or panels offering nothing more than an information dump. Adults **are problem centric, not content centric and want answers to their burning questions and problems.***

AALL Annual Meeting Conference Education Improvements & Recommendations

1. Conference Goals And Audience

a. Identify primary and supporting goals of Annual Meeting and the appropriate audience.

According to the Guidelines for Annual Meeting Programming Planning, the Annual Meeting is planned to generate revenues in excess of direct and indirect costs to enable AALL to underwrite other activities not fully supported by dues revenue. For this reason, AALL needs to clearly identify the top three or four conference audience segments that have the most potential for growth and create content that would attract them. We suggest that the top audience segments are:

- i. Academic (largest segment, very influential)
- ii. Private (2nd largest, most desired by exhibitors/sponsors, need attendance justification)
- iii. Research Instruction and Patron Services (3rd largest, has members from all library types)
- iv. Computing Services (technology draws all segments)

In order to grow the conference revenue and attendance, it is imperative that the AALL Board instruct staff and AMPC to focus on these segments for growth. Trying to be all things to all people delivers a weak, shallow, watered down experience and the main audience segments will not continue to attend.

One of the key measures of success for a healthy association conference is the number of repeat (loyal) attendees. AALL should measure and track loyalty of each primary segment each year. A healthy segment or conference will have 70% or greater regular attendees (conference participants that attend two or more years out of the last three). Pay very close attention to these metrics and develop strategies for improving retention and loyalty for each desired segment.

b. Align all conference programming with AALL strategic plan, board direction and annual meeting goals.

All conference content should align with AALL's strategic plan and board direction. If the board has identified two-four big picture issues for the year, the conference content should align with those issues. In addition to that, the AMPC should suggest to staff potential conference themes that are strategic in nature. Themes should focus on big ideas, issues and challenges to the profession and not hokey or cute themes for decor. It's about creating a narrative and context for content. Then all education programming should tie back to theme and big idea or issues.

c. Adopt a "We serve our members best by serving our profession first" attitude as one of the overarching educational goals.

Currently, trying to be all things to all members is fracturing the conference attendees' experience. Allowing all SIS to offer programming and hold committee meetings during the conference is not in the best interest of the entire profession or the conference participant. It is in the best interest of some smaller groups within the association.

The AALL membership wants to see all AALL leaders in the Annual Meeting programming. When the AALL Board, committee leaders and SIS leadership do not attend AALL's programming, it sends the message to the average attendee that the content is not good enough or worthy of their time. Some leaders have stated that the content is not advanced enough to attract them so the content must change.

SIS leaders are dealing with meeting fatigue from attending too many SIS meetings during the conference. Then they do not want to attend conference education.

The SIS programming and meetings are directly competing with AALL programming. People attend the conference for education and networking, not to attend SIS or committee meetings. Consideration must be given to how SIS leadership can plan their year outside of the conference. Perhaps they can use video conferencing available through Google+ or Skype and use the Annual Meeting as a place to network and learn together. If committee members don't have time to connect or meet on their own schedules, then how are they serving the profession first? The SIS committee meetings should align with the goal of the annual meeting, revenue and education of members, not planning their SIS year.

d. Create conference education that differentiates itself from all other industry education offerings that focuses on attendee learning.

AALL's current education programming of information transfer or show-and-tell is not a good differentiator to help AALL compete in the future. AALL is facing increased competitive pressure due to the prolific availability of free information coupled with the desires of other Associations to attract the Private Law Librarian attendee segment. Some of AALL's own members, exhibitors and vendors have also become competitors offering free, quality current education. Access to the most current information will not serve as a competitive member value into the next era.

e. Adopt learner-centric education strategies that go beyond information transfer in order to differentiate itself.

AALL should not want to compete with other organizations that are offering free, current information, updates and resources. Instead, AALL should offer a higher level of hands-on, interactive education that is:

- i. Worthy of participants' investment of time, money and resources that provides high level of participant engagement, learning and retention
- ii. Is relevant, solving participants' problems
- iii. Provides more peer-learning and knowledge sharing than the sage on the stage instead of the guide on the side
- iv. Easily applied and implemented in its members' workplace
- v. Focuses more on creating a unique experience that is unparalleled to other education and conference experiences that have become stale and commonplace

- vi. Has networking value
- vii. Is free of bias

This is not an easy task and will require changes to make the learning superior, more accessible with continuous improvement. It will also require a shift in thinking from instructor-centered education to learner-centered plans. AALL will need to focus on strategically thinking about education initiatives first before focusing on program scheduling and logistics.

2. Politics

- a. **Transition the AMPC from a detailed logistic scheduling committee into one that is strategic that recommends topics and identifies issues and challenges of AALL participants.**

AALL leans too heavily on the AMPC to choose speakers and content for the Annual Meeting. Staff's role has been diminished to that of an administrative assistant taking direction and orders from the committee members. Both staff and AMPC have become prisoners of operations instead of being strategic and big picture thinkers and partners. This is backwards and does not use AALL's leaders or volunteers to the best of their abilities.

The AMPC needs to be one of advisory and strategic in nature and not one concerned with politics, scheduling and logistics. AALL's staff should transition into meeting strategists that handle the logistics and also operate as content curators. Both staff and AMPC should act as curators that intentionally create a conference schedule based on issues and topics.

The primary focus of the AMPC should be one of identifying the top three or four audience segments' needs, challenges and issues. Not one of approving speaker proposals and scheduling programming. Staff can develop an initial conference schedule by slotting issues and challenges in program times. Then they can search for and identify speakers for those topics.

In some associations the AMPC has transitioned into an Education Committee that identifies problems, issues and needs of all members for education programming throughout the year. While there are many committed and knowledgeable volunteers on the AMPC, they are not being provided training on understanding and knowledge of appropriate content creation, presentation skills and adult learning. Either AALL staff needs to fill that gap or the committee members will need training and coaching for selecting and sourcing presenters and sessions for advanced learners. The challenge in doing the latter is that the committee members change every year so the training has to happen each year. This is a barrier to creating a sustainable conference process with a focus on the attendee.

b. **Move SIS education programming to another conference or a pre-conference format.**

AALL, board and AMPC are all balancing the political needs and demands of some of the SIS for the conference. The average AALL member is unaware of the difference between the SIS programming and the annual meeting programming.

Most SIS's secure programming that is in the best interest of their SIS group, not of the average conference attendee. AALL must take control of the SIS programming and move it all to one day or not offer it at all during the conference. The political posturing of the SIS groups is causing division of AALL membership ranks. A house divided eventually falls.

While AALL wants to offer programming to all its members including SIS, currently the SIS groups are taking up unnecessary meeting space to have small board/committee meetings during conference education. This exacerbates the challenges and tension between AALL and the SIS. This also causes AALL to be a conference space-hog and therefore not get the best hotel and space meeting rates. Hotels and Convention Centers count on space to sell guest rooms and drive food and beverage revenue. Utilizing a disproportionate amount of meeting space, without food and beverage revenue, makes AALL less desirable to these facilities. The conference experience is not designed to offer more board and committee meetings. It is offered to help attendees network and learn, not plan their SIS future.

If SIS conference programming and meetings are going to be offered, the Board should place limits on both. If not, the AALL conference will continue to grow with increased SIS programs and meetings and AALL will get less and less revenue for their annual budget from the experience.

While currently most SIS are having meetings in non-conference hours, early mornings or evenings, the SIS leadership is being overtaxed physically and mentally. If they are attending meetings in their down time, their education and learning experiences will suffer. The SIS leadership is being overworked and not able to focus on their own professional development.

AALL is competing directly with the SIS for sponsorship dollars, conference participants' attention and meeting space. Too much staff time is being dedicated to SIS programming than quality education content. Too much of AALL's resources are also being devoted to securing SIS meeting space and scheduling SIS programming.

The average participant is the one who is suffering because AALL staff is being forced to concentrate resources on diversification instead of the primary audience segments that will grow the conference. This diversity is degenerating into splintering.

- c. **Make all SIS programming accountable to the same criteria as conference programming: higher evaluation scores, attendance and alignment with AALL's mission, strategic plan, overarching conference themes, etc. If it can't meet those goals, it should be dropped or omitted.**

To the regular attendee, there is no difference between SIS presenters and Annual Conference presenters. The current SIS programs are actually a liability to the AALL Conference. Why? Because of the lack of accountability for SIS's to provide quality programming. They are not required to have an evaluation process, therefore there is no assurance that they programs offered are of a high quality. Attendees therefore think that AALL is providing weak programs.

The SIS groups do not offer programming that's in the best interest of AALL's top three audience segments that will help the conference grow. Nor do they offer conference programs that help further AALL's mission and strategic plan. Instead, it's become a smorgasbord buffet of anything-goes-content and speakers ultimately watering down the entire conference experience for the attendee. To the average member, there is an obvious disconnect in the current conference programming although he/she may not be able to specifically identify the SIS-AALL tension.

Other associations have created specific SIS conferences or transitioned the SIS into online communities only.

AALL could provide leadership and basic association 101 training for all SIS leaders. They could help SIS leadership understand that AALL needs to be market-driven: looking at the needs and wants of the profession they serve, not just the smaller groups within the profession.

The International Food Technologist society is one association that transitioned its special interest groups (called divisions) into online communities only. They stopped allowing each division to have their own budgets and executive board. They provided ample training to the leadership so that they could become online community managers focused on helping their groups connect online, provide resources within their communities and curate content. While many thought IFT's Board's decisions were too rash, the outcomes have been the opposite. It was a risk that they couldn't afford not to take. They realized that that they ran far less risk of having able people as online community managers than the risk of offering mediocrity in their programming to all its members if they continued with their old model.

3. Timing

- a. **AALL should reexamine its traditional conference planning process with a focus on providing current, relevant content that meets its primary audience segments' needs.**

Some traditional speaker selection deadlines and requirements are outmoded and unnecessary. The deadlines need to be reevaluated and redesigned.

Final speaker selection should be done six to seven months in advance of the conference, not nine to ten months in advance. We recommend that 25 – 35% of the programming be held back to be filled with relevant and current selections.

Here is one possible Conference Planning process that could be followed:

- i. First, the committee would identify important workplace challenges or difficult problems of the top three attendee segments for growth. Crowdsourcing techniques work well for identifying challenges, problems or topics.
- ii. A draft conference schedule should be developed by staff placing content and topics in each time slot. These topics should create semantic threads that tie back to an overall conference theme. The Annual Meeting Programming Committee can then provide feedback and input about the proposed schedule of topics, not speakers. Note, topics should attract the top three market segments that will help the conference grow, not being all things to all people. This means that the current process of allowing all 13 SIS first choices is not in the best interest of AALL on the whole.
- iii. Next, these topics and issues should be listed within the Call for Proposal with a note that preference will be given to speakers that submit presentations that match with these issues. Submissions that include more than three presenters (including moderator) should be avoided. Sessions that are geared towards the advanced learner, are new or hi-tech should be strongly encouraged.
- iv. The Call for Proposal should also ask the submitter to list past presentations (where, when), presentation scores, adult learning techniques and if the presentation has (or will be) presented at another conference. Up to three learning objectives should be identified with specific recommendations for the proposer to think hard about what the learner will be able recall, think or do differently after the session.
- v. Once proposals are submitted, all proposals can be reviewed by the conference committee in a blind review process only, where the presenter(s) name, contact information, sponsor and bio have been removed. This will help reviewers focus on the content (as an attendee would) and avoid association politics. The proposal review process can actually be done electronically on an Excel spreadsheet. AALL staff can include past speaker ratings. This process should be completed in December and January.
- vi. Once everyone has evaluated and scored the proposals, they should send their spreadsheet to staff. Staff then averages the scores and selects proposals from the top 20% or 30% that received good scores. Only proposals that align with the content identified on the schedule and those that scored well should be selected. Ideally, 65 – 75% of the full program will be confirmed in time for registration opening. The balance of the program can be sourced by

staff (with committee approval) and dripped out to the membership in the months leading up to the Annual Meeting.

- vii. Submissions that are not accepted should be communicated by staff. The great majority of associations that we encounter either send a form letter or email. We've attached a sample that's been used by other associations (see Attachment D). Where appropriate, submissions that are not accepted should be considered for webinars, workshops, articles or poster presentations. AALL Education staff is in a better position to filter and coach these submissions for future opportunities.
 - viii. AALL should issue speaker contracts for all accepted submissions. Speaker contracts help protect AALL, but also ensure that the presenter is on the same page for the expectations and compensation. See Attachment E for an example of a good speaker agreement template.
- b. **AALL should not schedule approximately 20%-25% of the education programming until eight-four weeks from the event.**

This gives AALL time to identify the most current and hot topics possible. It also affords AALL the ability to use drip marketing and announce "just added hot topic sessions." In today's culture, content that is planned a year in advance can quickly become outdated and irrelevant.

4. Effectiveness vs efficiency.

- a. **AALL staff should reevaluate all conference planning processes based on "must haves," "like to have" or "unnecessary" procedures.**

Some of the information that is being compiled and collected is unnecessary, such as speakers' resumes, curriculum vitae and supplemental information. Some of the conference deadlines and procedures have been in place a long time and actually do not benefit the conference attendee. The focus should shift to conference attendee learning. The focus should be on "What's in the best interest of the conference participant?" If it does not help improve learning or speaker effectiveness, then why is it being done? All deadlines, procedures and requirements should be reevaluated and some should be redesigned. There have been many advances in technology and systems since AALL processes and procedures were first established. A review will help ensure that all of these activities are streamlined and support the conference attendee.

Preparing an AMPC speaker binder so that the AMPC can evaluate speaker proposals is unnecessary. Those associations that still allow a committee to evaluate speaker proposals use an Excel spreadsheet and blind scoring. The reviewers only see the presentation title, short description, learning outcomes, whether the speaker has spoken before, where the speaker has presented in the past, the adult learning techniques being used and past speaker evaluation scores. The speakers' names, bio, company and other contact information is withheld so that it's a blind review process. If the AMPC continues to review speaker proposals, we strongly

recommend that it's done through a blind review process.

5. Conference Content

- a. **AALL should move away from the traditional Call for Speaker Proposal process and instead take an intentional curator strategist positions.**

In a recent conference for meeting planners, 68 out of 70 organizations had dumped their conference call for proposal process and ceased allowing committees to select conference speakers and presentations. These organizations transitioned the conference committee from one focused on meeting deadlines and picking speakers to one that offers strategic advice helping drive the conference experience. Some of the associations still offered a call for proposals but did not rely upon it as heavily as they had in the past. If submitted speaker proposals did not meet identified content, they were not used.

Often conference committees that have final approval of speakers and presentations allow politics or personal preferences to guide their decisions. This process only provides for the least common denominator and lacks strategic intention. It is an archaic and outmoded process that no longer works. The call for proposal process, while well-intentioned, is one of chance, coincidental, unplanned and very risky.

- b. **Transition the AMPC into a strategic committee that offers input, feedback and advice about big ideas, issues and topics.**

While an AMPC can provide input and advice into the design and experience, the committee should not be involved in the final decision of speaker selection. Conference committee members are usually not experts in adult learning or presentation skills and therefore lack the expertise to secure speakers that are in the best interest of the audience.

In those organizations discussed previously that dropped the call for proposal process, the conference committee offered input and insight about audience's needs, problems, challenges and topics instead of approving speakers. Then staff designed a conference schedule around topics and matched speakers to the topics instead of scheduling speakers from proposals. This allows the organization and its staff to differentiate the conference content from competitors and focus on good adult learning and presentation skills when picking speakers.

- c. **The AMPC and staff should theme conference topics around two to four main issues and then provide semantic threading for the rest of the content.**

The focus is on curating conference content that creates a narrative, spurs contextual learning, evokes conversations and communicates themed messages.

6. Focus on Quality

a. AALL should focus on providing more quality content and not quantity.

AALL has tried to be all things to all members. This has caused some of AALL's committees and groups to jockey for time slots and attention at the annual meeting. AALL should scale back it's number of presentations, use larger rooms and secure speakers that have good presentation skills and offer good adult learning techniques.

7. Good Adult Learning Best Practices

a. AALL will best serve participants' needs by significantly reducing the amount of presenter or panel monologues and instead offer presentations that use good adult learning practices including audience engagement and peer sharing.

Most of AALL Annual Meeting programming is nothing more than information transfer, providing data, facts and content that should be distributed in reports, webinars or white papers. The conference programming should focus on conference participant learning.

Information transfer does not equal education nor does it equal learning. Content covered through lectures or panels does not mean content is learned. Typically during an information transfer or show-and-tell format, a presenter lectures accompanied by slides. This type of program leads to minimal learning. It is only when the presenter engages the learner in activity such as small group discussions or peer conversations that learning takes place.

8. AALL should invest in presenter training, helping speakers improve their presentations skills, content development and delivery.

Investing in members will ultimately help AALL improve their programs.

Typically most people model their education programming after their own schooling. We tend to teach the way we were taught. Since lecture was the most prevalent method used in schools, we naturally emulate what we know. It is also much faster to organize and plan a lecture or panel presentation than prepare education programming that provides time for meaning-making, processing, practice and feedback. Interestingly enough, there is ample evidence and research showing that traditional lectures and panel presentations hinder and decrease learning and education. Lectures provide the least amount of ROI for learning and education.

Currently, AALL's education program model is similar to an instructor dispensing knowledge onto sponges that soak it up. This expository method actually hinders true education and learning. We are not sponges that just soak up information. Our brains are not like recording devices that an individual can hit record and automatically record everything seen or heard to later play back at will.

AALL needs to transition its education programming from information transfer to engaging learners that promote grounded brain-based strategies (See Attachment A and B for more on information vs. education vs. learning and brain-based strategies). The higher the audience interactions in actively participating equals the higher the degree of learning and the higher the degree of the attendee's rating.

AALL members are superior subject matter experts, but many lack effective presentation skills. Seasoned attendees primarily attend education sessions in support of their friends, colleagues or SIS vs. what they might learn. We highly recommend that AALL provide facilitator and presenter training for its member speakers on developing content, presenting with the learner's brain in mind and provide guidance on how to increase attendee participation.

i. Presenter training on developing content

AALL should invest in training to help presenters develop clear presentations covering three to five points only and [define crisp session titles, session descriptions and learner objectives](#).

ii. Presenter training on presentation skills and developing visuals

AALL should offer presenter/facilitator training and coaching that leads to improved audience learning and participation. Some of this training can be provided via webinar, short videos, conference calls or presenter bulletins. AALL should invest in its speakers so that they deliver high learning value for the AALL conference attendees.

Aren't Librarians Introverts?

Often when associations survey members and ask them if they want interactive, hands-on conference sessions, the members respond with no. Their no response is due to several reasons:

1. Uncertainty and unfamiliarity of what interactive or hands-on means.
2. Members don't think they have enough time or will get the support from their organization.
3. Members grew up with lectures as traditional status quo and don't have any experiences with other types of small group, hands-on activities.
4. Members think they learned from lectures when they were in college although they forget they still had to study the information the professor presented in order to pass the test.
5. Members fear that interaction means they will be put on the spot in front of audiences and feel uncomfortable.
6. Members fear change and their frame of reference makes them fear the unknown.
7. Members don't know what they don't know.
8. Members lack experience with anything different from a lecture.

However, associations that have transitioned from lecture-based information sessions to interactive, attendee engagement education have had resounding success, increased favor and volunteerism from attendees.

More Comprehensive Evaluation Process

More comprehensive evaluation process for education and move away from smile sheet evaluations

- a. AALL should improve their evaluation system to better assess how each speaker performed in the eyes of the attendees. The current ratings system is considered a "smile-sheet" evaluation in the education world and has very little value or ROI. By only asking five questions for each presentation (Learning Objectives met, Speaker Knowledge, Effectiveness, Handouts and Speaker Presentation), AALL is shortchanging itself and its members of increasing education value. A more comprehensive evaluation should be used to help improve future programming. An improved speaker evaluation would include questions like:
 - i. Did the presentation match the session description and learning objectives?
 - ii. How would you rate the relevance and content of this presentation? (using a 1-5 scale rating with 1 poor and 5 being excellent)
 - iii. How would you rate the facilitator's presentation style and delivery? (using a 1-5 scale rating with 1 poor and 5 being excellent)
 - iv. How would you rate the facilitator's knowledge? (using a 1-5 scale rating with 1 poor and 5 being excellent)
 - v. The facilitator avoided promotion of their company and self (using a 1-5 scale rating with 1 poor 5 being excellent)
 - vi. I learned something new. (using a 1-5 scale rating with 1 being to no extent and 5 being great extent)
 - vii. I will be able to apply what I learned to my job. (using a 1-5 scale rating with 1 being to no extent and 5 being great extent)
 - viii. I would recommend this content and presenter to my peers? (using a 1-5 scale rating with 1 being to no extent and 5 being great extent)
 - ix. What did you find most valuable from this session? Open ended fill in the box.
 - x. What did you find least valuable from this session? Open ended fill in the box.
 - xi. How will you apply the information presented in this session? Open ended fill in the box.
- b. AALL should implement a gradual presentation and presenter improvement plan using a more comprehensive evaluation process.

AALL should set an overall average satisfaction goal for each of their speakers. Consider starting at an 80% overall average favorable rating for all speakers. Evaluate speakers on the criteria listed above with an average rating of items ii through viii. After year one, consider moving up the overall percentage favorable five points for the next year. Keep the process until the AALL is showcasing a 90% or 95% overall favorable average of all its speakers.

Transparent associations publish session ratings on-line. This is a helpful resource for SIS's and Chapters for identifying best in class presenters. It also is an effective process for

weeding out the poor presenters. If AALL is concerned about hurt feelings, consider just posting the top 20 sessions.

- c. **Increase Response Rate** – AALL receives about a 34% response rate. We recommend that you provide attendees with the ability to immediately go online and complete a session evaluation. The session moderators should be instructed to save three to five minutes at the end of the program so attendees have time to be part of the education improvement efforts.
- d. **Session Counts** – AALL should keep meticulous records on session attendance. We recommend that you have a room monitor take a headcount 15 minutes after the start of each session and again at 15 minutes before completion. A mass exodus is a strong indicator for a poor session. Rarely does this show up on a session evaluation.

Additional Education Recommendations

- a. **Content Chunking** - Neuroscience shows that the average adult attention span is 10 minutes. Current 21st century instructor research shows that a presenter needs to chunk content into 10-minute bites. Chunking content will help the brain remember, recall and learn information. After each 10-20 minutes of content, the presenter should have the attendees discuss that content with one another. Posing good questions to the audience for discussion increases audience participation and engagement.
- b. **Innovative Formats** - Session formats like BattleDecks are very popular and entertaining, but the learning value is low. Instead, we recommend an [Ignite or Pecha Kucha](#) format. If influential members are able to present on a relevant topic they're passionate about (and small group discussion time is programmed in between), AALL will provide greater value to the participants. These innovative session types also help improve presenter skills.
- c. **Less Talking Heads** - Decrease the number of panels and panelists in current education programming. More panelists equates to more talking heads. Limit sessions to two presenters max.
- d. **Extend Learning** - As part of your speaker agreements, request that each speaker assist in extending the learning and educational value. One way that AALL can achieve this is to require each presenter to write an advanced newsletter article, blog post or LinkedIn discussion that relates to the topic being presented.
- e. **External Speakers** – Attendees want to hear from more external speakers. By filling in programming gaps closer to the meeting and not relying exclusively on the Call for Proposal process, AALL should have greater success in recruiting external resources without breaking the bank. A future trend that conferences will increasingly use is to video interview (skype or in person) a thought leader that can be replayed for provoking session discussion.
- f. **Interview Subject Matter Experts - SME's** – One tactic that can be used to improve the presentation skills of speakers is to hire a professional emcee that can interview them and help keep the session interesting and on track.

- g. **Saturday Programming** – Currently AALL is conducting CONELL, PLL Summit and workshops. Overall, this strategy is good. Keep doing this and make sure that any Saturday programming is geared towards attracting new attendees. The justification and ROI of a highly targeted day of programming is easily converted to full conference participation and loyalty.
- h. **Room Sets** – In order to encourage more discussion and participation, we recommend that standard room sets to include round tables of seven each with theater style seating in the back of the room for overflow. Wherever possible, omit the headtables that create a barrier with the audience.
- i. **VIP Programming** – AALL should consider developing an exclusive program that targets Large Firm Directors. If you can create a “don’t miss experience” for these individuals that is invitation only, it will significantly help you win that segment.
- j. **More Small Group Discussion** - AALL should implement other educational strategies such as Peer2Peer Roundtable discussions (Coffee Talks), case studies, pair-squared, peer-collaboration, etc. Topics like – What works for me or Lessons learned from... More interacting learning formats can be found at [this link](#).

For Coffee Talks or Roundtable discussions, we recommend that each table/topic have a facilitator. The facilitator helps promote communication among table participants and facilitate discussion. They are not to serve as an expert. See attachment F and G for sample Peer2Peer Facilitator Guidelines and Note/Scribe Sheet. We recommend that you publish and distribute the notes from the scribe sheets.

- k. **Future Locations** – AALL should confirm future locations three to four years prior. We recommend that you consider facilities that can accommodate the conference under one roof. i.e. Gaylord Chain. Booking further out may hinder your negotiating and not allow for continuous improvement and change. First tier cities always cost more, but also always draw a bigger crowd.
- l. **Awards Ceremony and Tuesday Lunch** – We highly recommend a final event that helps celebrate the profession. Awards ceremonies have to be very crisp and fast pace to keep the audience’s attention. Station winners adjacent to the stage instead of coming up from the audience. Take pictures of the award winners before or after the session. Use short videos and photos of award winners to increase recognition and speed.

2012 Proposed Conference Schedule

This proposed 2012 schedule has been drafted to accommodate more 75 – 90 minute session time slots while also programming additional “white space” of 30 minutes between most sessions. The longer session times will be needed to accommodate more participatory learning formats. White space is highly recommended to help encourage more hallway discussions while allowing attendees time to process.

Saturday

5:00 pm – 6:30 pm Exhibit Hall Ribbon-Cutting/Opening Reception

Sunday

7:00 am – 8:30 am Type of Library SIS Breakfasts/Business Meetings

8:45 am – 10:15 am Opening General Session

10:45 am – 11:45 am 60 min (A) sessions

Noon – 1:00 pm Open scheduling, SIS Luncheons

1:15 pm – 2:45 pm 90 min (B) sessions

2:45 pm – 3:45 pm Exhibit Hall Break

3:45 pm – 5:00 pm 75 min (C) sessions

5:15 pm → Open Scheduling/Receptions

Monday

7:00 am – 8:15 am Open Scheduling

8:30 am – 9:45 am 75 min (D) sessions

9:45 am – 10:45 am Exhibit Hall Break

10:45 am – 11:45 am 60 min (E) sessions

Noon – 1:00 pm Open Scheduling, SIS Luncheons

1:15 pm – 2:15 pm 60 min (F) sessions

2:45 pm – 4:00 pm 75 min (G) sessions (up from 60 min)

4:15 pm – 5:30 pm Business meeting (this requires us to move the awards to the lunch)

5:30 (or :45) pm → Opening Scheduling

Tuesday

7:00 am – 8:15 am	Open Scheduling (Coffee Talks 7:30 am – 8:15 am)
8:30 am – 9:45 am	75 min (H) sessions (up from 60 min)
10:15 am – 11:45 am	60 min (I) sessions (up from 30 min)
Noon – 1:30 pm	Association Luncheon (keynote speaker, leadership recognition, major awards)
1:30 pm – 2:30 pm	Exhibit Hall Break
2:30 pm – 3:15 pm	45 min (J) sessions
3:45 pm – 4:45 pm	60 min (K) sessions (up from 30 min)
5:00 pm →	Open Scheduling

For future years, we recommend that AALL consider programming at least one keynote presentation each day. Your members tend to be the most stimulated by those.

Expo and Sponsorship Sales and Service

AALL sales efforts are primarily organized around products. Your exhibitors and sponsors are being presented with opportunities from Hall Erickson, Bill Spilman, AALL and even some SIS groups. With a fragmented approach, customer and prospect data and objectives are not optimized for mutual success.

We believe that AALL can better leverage its relationships by deploying sales resources based on customers, not products. Ultimately, an industry supplier is buying access to your audience. For major exhibitors and sponsors (\$25K or more annual spend or potential), packaging that access and understanding their goals, will enable AALL to better meet their needs.

1. Sales Structure

- a. Key account sales deployment using a consultative sales approach for your major exhibitors and advertisers will pay dividends. Consider categorizing and selling all exhibit space, sponsor and advertising opportunities as customized or bundled packages. [Key account sales](#) need to be identified and targeted based on a minimum dollar expectation or strategic value to AALL.
- b. Mid to low level sales activity can be accomplished by aggressively pursuing re-signs and reselling past exhibitors. Many shows have great success in accelerating these results by conducting [on-site booth sales](#). Often, this process incorporates a loyalty or priority point system. The best loyalty programs include sponsorship and advertising spend along with booth sales for the last three to five years.
- c. Every conference needs to beat the bushes to attract new or regional players. Make sure that the efforts of Hall-Erickson significantly address acquisition of new players.

2. Sales and Service Approach

AALL should align their sales and service approach with their exhibitor, sponsor and exhibitor type goals. Communicating with a one-size fits all sales and service approach is not the most effective method. Customized, more [relevant and personal communications](#) will cause exhibitors and sponsors to be more invested in your conference. Here are the goals and expectations of several exhibitor and sponsor types:

- a. **Anchor Exhibitors** – Mostly want to meet with their existing customers that attend your conference. Their ROI is quickly apparent when they are given the opportunity to strengthen and grow these existing relationships. If the company is launching a new product, tradeshow are a beneficial tactic to accelerate awareness and ultimately the speed of the close. Anchor exhibitors that feel invested in your event will help drive their customers' attendance. Generally speaking, these companies like an abundance of private law library attendees. Savvy anchor exhibitors also understand and value the influence of the Academic attendee segment.
- b. **Small Exhibitors** – These exhibitors are usually interested in lead generation. Secondly, they wish to achieve greater brand awareness. They often want to get the

attention of the anchor exhibitors as well to try to develop partnerships or become an acquisition candidate.

- c. **New Exhibitors** – These exhibitors frequently have the same attributes as small exhibitors. In addition, they need more hand-holding and ongoing care before they will become loyal exhibitors. Repeat phone calls and ongoing tips about their exhibition success after their initial sale is crucial help them reach their goals. Consider a new exhibitor tips e-news that includes basic exhibitor advice like:
 - i. send two people to work the booth
 - ii. network in the hallways and sessions to get the full value of your investment
 - iii. consider taking potential clients for dinner or entertainment during the evening
 - iv. connect with potential customers and your best clients early, before the conference begins, to set up appointments or informal meetings
 - v. Remember, the attendees have lots of options and you'll want to get their attention before you arrive at the conference.
- d. **All Exhibitors** – We recommend that AALL invest in coaching all exhibitors to help them improve their before, during and after conference experience with clients and potential clients. Helping exhibitors understand that attendees are interested in finding solutions for their problems is critical to their success. Attendees respond best to exhibitors that provide helpful information and education onsite like case studies, white papers, hands-on demonstrations than an aggressive pressured sales-approach.

3. Other Ideas and Recommendations

- a. **Virtual Booth Packages** – We highly recommend that you work with Hall Erickson or a technology provider (see technology section for recommended vendors) to offer a richer online attendee tool for your expo hall. We believe AALL can generate \$10K or more in revenue plus provide increased value to both exhibitors and attendees. AALL should offer a [free basic listing, plus an upgraded and premium online package](#). On-line booths should be offered with the initial booth sale and packaged with advertising sales. Enhanced listings that include photos, videos and show specials help provide attendees more reasons to visit your show website and make advanced plans.
- b. **Show Hours + Opening/Closing** – Exhibitors often want more dedicated expo hours. With a smaller show, like AALL, there is more than enough time to navigate the floor.
 - i. We think the opening reception in the hall provided a great initial preview. Continue doing this, but consider passing drinks and appetizers to help keep the lines down for the initial rush.
 - ii. The closing reception in the hall did not pay dividends. Consider scaling that back.
 - iii. Consider offering a concession and dining area in the exhibit hall. Some conferences include a voucher for \$12 or so to help drive lunch time traffic.
 - iv. Wherever possible, AALL should not schedule committee meetings or conflicting events on Sunday and Monday during lunch times.

- c. **Virtual Booth Demonstrations** – Exhibitors and sponsors invest a lot of money to reach your audience. We’re starting to see a trend of major exhibitors capturing their presence at the show through [video booth demonstrations](#). AALL should consider identifying a resource that can help major exhibitors share the cost of this type of visibility.
- d. **Publisher User Group Sessions** – In Philadelphia we noticed that several publishers were conducting small user group sessions in the meeting space during educational sessions. We’re mixed, but think your best bet is to permit this, but to rent the space much like you would the exhibit space.
- e. **Sponsorship Packages** - Any a la carte sponsorship opportunities should be priced to include the product costs plus overhead in managing the sponsorship. Often times, promotional items like conference bags are priced at two – three times the hard cost of that purchase.

A growing desire for exhibitors and sponsors is to help support exposure opportunities that show them as a thought leader or industry supporter. As you work with IEG, be sure to evaluate sponsorship opportunities that include keynote speakers, naming rights on session tracks or scholarships for discounted registration. In a recent survey conducted by our company, over 85% of the 140 associations surveyed answered that they occasionally or always seek sponsors for professional speakers, sessions or content tracks.

Marketing and Website

AALL has built a conference with more of a loyal following than most. Because of that, they trust you to deliver a quality program and networking opportunity. Later in this document we make recommendations for a conference Mobile App, Conference Blog and other tactics to leverage your hi-tech audience. Here's a number of initial recommendations for improving marketing effectiveness and reach:

1. **Conference Website** – AALL desires a conference website solution that can be updated by numerous staff resources, is mobile accessible and includes intuitive navigation menus. We strongly encourage you to consider focusing most of your time designing the experience for what attendees or potential attendees want to do:
 - a. **Session Search** – Attendees want easy to understand grids so they can consider the available content by day, time, track, speaker name or keyword/phrase. They want to view the session title and be able to drill down for more information. They want to see the speaker's photos and read their bio. They want to add sessions to their personal planner. Look for solutions that allow speakers to upload their own information and have it automatically pushed to the Annual Meeting website.
 - b. **Attendance Justification** – New attendees may need to justify their attendance to get approval. This will be especially true for Private Law Librarians and Technical Services participants. Consider creating additional templates and narratives that give any desired audience segment a specific tool to help justify the time and expense to attend.
 - c. **Exhibitor Search** – Attendees want access to a real-time floorplan that allows them to search by keyword/phrase, primary product category, secondary product category, booth number or exhibitor name. The best shows are refining this list every year to make sure that they are keeping up with the times and delivering search results that match the requests. (Hint – by reviewing keyword searches, you can identify categories or sub-categories that should be added.) To improve engagement, some shows allow users to create a list of exhibitors to visit, the ability to schedule appointments and to request info. Look for solutions that allow exhibitors to upload their own information and have it automatically pushed to the Annual Meeting website.
 - d. **Focus on Members** - Utilize member photos from past annual meetings as much as you can.
 - e. **Solutions to consider** – Based on our understanding of your needs, we recommend that you benchmark these solutions:
 - i. **Syscom** – Solution used by AALL now.
 - ii. **HigherLogic** – The community solution that AALL has includes a feature rich Content Management System.
 - iii. **a2z, Inc** – We like the solutions that they offer for attendee tools and speaker/exhibitor portals for uploading data. (Disclosure – a2z is a consulting client for Velvet Chainsaw)

- iv. There is a growing trend for conference organizers to develop websites utilizing Wordpress and available plug-ins.
2. **Convention Newspaper** – We recommend that you discontinue publishing this onsite newspaper and fully embrace the blog and mobile app recommendations made in later sections. AALL should be able to shift the financial benefits of this publication to online channels. The additional benefits of digital publishing include:
 - a. More easily shared with those not there.
 - b. No delivery expense.
 - c. Content is not subject to a print deadline.
 - d. Environmentally friendly.
3. **Final Program** – Overall this publication is very thick, confusing and doesn't include hardly any photos of your members or speakers. The SIS programming is included, but leaves question marks in a new attendees mind on why there is less information provided. (like speaker name or learning objectives)
 - a. Consider developing grids and listings for education programming only. Committee meeting schedule could be provided on a separate handout given to those that participate in that portion of the week's activities.
 - b. For the exhibitor listings, consider providing a separate piece or pull out from the annual meeting that includes a map of the exhibit hall, alphabetical listing and listing by product category. The addresses and company descriptions can live on-line and within the mobile app.
4. **Alumni Registrants** - Consider developing a campaign that is specifically targeted to make it easy for past attendees (last two years) to register. Registration information should be prepopulated so they can quickly and easily say yes. Alumni registrants like that you know they are loyal. Give them a week head-start to register and book their housing. After they register, make sure they are removed from the email marketing list.
5. **New Registrants** - These registrants need bullet lists of specifics that will help them quickly get WIIFM (What's in it for me). Consider identifying primary job types and brainstorm the benefits that they will get out of attending. Identify the sessions that may make the most sense for them to attend. Both alumni and new attendees will often be swayed to attend more based on the current registrant list than the program. Publish this list weekly in PDF form on your website.
6. **Use Exhibitors and Affiliate's to Help Promote** - The cost of acquisition of a new attendee is often in the 20% range. Consider creating incentives for exhibitors or bloggers that pay that benefit back to them. It doesn't need to be cash. It could be something like one free registrant for every five new attendees delivered. Exhibitors can be one of your most powerful marketing partners. They are very effective in convincing their existing customers to attend conferences where they have a strong presence.

Technology Recommendations

AALL has a tech savvy audience. They appreciate when you push the technology envelope and provide them with tools that extend the conference experience beyond three days. We recommend that you make the following changes for your conference technology plan:

1. **Attendee Mobile App** – Currently AALL is using SCHED. There are much better attendee solutions that are very affordable (less than \$5K). Conferences with high adoption of mobile apps are scaling way back on the thickness of their final program.

Look for solutions that include these features:

- a. One content management system creates web app and native apps for I-Phone, Droid, Blackberry and I-Pad. Ability to make changes on-site and push out notifications.
- b. Attendees are able to create their personal itinerary and bookmark their favorite exhibitors.
- c. Floor plans for the conference facility and expo are provided.
- d. Ability to provide sponsor exposure/monetization.
- e. Include access to handouts and twitter feed.

The three solutions that we like include:

- i. [CrowdCompass](#)
- ii. [QuickMobile \(solution used by ILTA\)](#)
- iii. [a2z, Inc.](#) (client of VCC, only makes sense if you use their solution for website too)

2. **Content Capture** – AALL is spending a lot of money (\$30K) to capture educational session recordings and sync. We believe that this has very low member/attendee benefit. It doesn't provide an immersive learning experience. Conversely, AALL has been very progressive in live-streaming plenary and several other popular sessions. Capturing and sharing the conference content is extremely important for serving and growing the profession. Here's what we recommend:
 - a. **Live Blog Sessions** - Consider recruiting a number of volunteers who will Live Blog conference education sessions for AALL. Posts can be published during the conference and in the weeks after. Volunteer bloggers could also do short video interviews to add to their posts. They could embed slide presentations or handouts. Here's [a link](#) to Content Marketing Institute. They recently did this. Having thought provoking posts that allow attendees to continue the conversation on-line is an additional reason to go down this road.
 - b. **Live Streaming and Video Capture** – We strongly encourage AALL to Live Stream one or more sessions each day. Since you are already renting the equipment and paying for the technicians, we also recommend capturing some of the educational sessions for future

webinar type educational experiences. Here's a few more tips that will help get the most mileage from your live-streaming investment:

- i. Coach presenters on how to connect and engage the virtual audience.
 - ii. Include a behind stage interview with the speaker(s) that is only available to the virtual audience.
 - iii. Select a volunteer to act as virtual moderator to engage the virtual audience through online chat and to help be the eyes and ears for the presenter(s).
 - iv. Encourage members to view as a group and provide a discussion guide that allows them to discuss the content with their peers.
 - v. In the weeks following the Annual Meeting, consider scheduling replays of the taped or live-streamed sessions. Ask the presenters to be available for live chat and Q&A. Drip the content out over time.
3. **New Registration Provider** – AALL staff expressed some dissatisfaction with your current registration provider. Exhibitors were also disappointed with the lead retrieval solution. CDS is one of the top three registration companies in the country, but is built and organized to service major tradeshow and conferences. AALL may be better served with a mid-tier provider. We recommend that you request bids and evaluate solutions from these companies:
 - i. [E-Show](#)
 - ii. [Expo Logic](#)
 - iii. [Streampoint Solutions](#)
4. **Posters Available On-line** – Consider publishing posters online to improve visibility and comments. Some organizations encourage the use of Prezi for optimal online viewing of posters. QR Codes used on posters help attendees bookmark and share links to thought provoking posters.

Attachment A – Defining Education, Information and Learning

Associations that are creating sustainable models and differentiating themselves from competitors have focused on attendee learning. They have developed education programming that follows a stair-step architecture of learning.

Defining Information

Information is an ordered sequence of symbols. As a concept, however, information has many meanings. The concept of information is closely related to notions of constraint, communication, control, data, form, instruction, knowledge, meaning, mental stimulus, pattern, perception, and representation. Information is a concept closely related to constrained communication and sharing data in controlled environments. Providing information is *not* a process of learning and applying skills. Information and information transfer is not education. It is just information.

The U.S. EPA, an organization that provides grants for environmental education, defines information as providing facts, figures and opinions. Interestingly enough, the U.S. EPA will not fund environmental education grants providing information programming or services. Their environmental education grant program only funds education endeavors.

Defining Education

Education comes from the Latin word educare meaning "bring up" and related to educere meaning to "bring out or bring forth what is within" and ducere meaning "lead." Literally, education is about leading others to bring out the potential from within.

Education is helping others learn skills in

- Critical thinking
- Problem solving
- Collaboration
- Decision making
- Evaluation and analysis

Education involves helping others identify the facts, make their own judgments and opinions about them, and then learn how to apply the facts in various situations. Education is about understanding the consequences of our actions before we make choices.

Defining Learning

Learning is an active process that takes place in the working memory. It requires that the learner attend to words and visuals and abstract meaning from them. The learner must then connect that meaning to existing knowledge and experiences for it to enter long term memory.

This learning process takes time and intentionality. It requires that the learner be given time to process the information shared through discussions with one another. Opening up a session for group question and answer is not enough. It is about learners conversing with others in small groups.

This means that less content is covered in conference programs and more time is given to audience interaction. It is only after new knowledge and skills are stored in long-term memory that learning really occurs and gets applied in the workplace.

We submit that AALL's conference education strategy should be about helping their members learn through participation, not just about information transfer.

Attachment B - Good Adult Learning and Brain-friendly Strategies

AALL should implement education that focuses on good adult learning strategies such as the following 14 principles:

- i. *Learning is fundamentally social.*
Learning is about more than the process of acquiring knowledge. Successful learning is often socially constructed and can require unlearning old ways. It may require changes to one's identity and core beliefs, which can take time and is challenging, yet powerful.
- ii. *Knowledge is integrated in the life of communities and the connections we maintain.*
Developing shared values, perspectives, and ways of doing things creates communities of practice and purpose. Learning is about optimizing our connections to people within our communities of purpose that matter to us.
- iii. *Learning is an act of participation.*
The motivation to learn is the desire to become an accepted member of a community of practice. It's about building and maintaining person-to-person connections that bring value.
- iv. *The depth of our learning depends on the depth of our engagement.*
We glean knowledge and retain more information from active participation in many different situations and activities. The more we are actively involved, the more our brains' hardwiring is fired-up and the more we learn. Thus, passive listening is the lowest form of engagement, next to reading information.
- v. *Engagement is joined at the hip with empowerment.*
We perceive our identities in terms of our ability to contribute. We want to have a positive impact on the life and growth of communities and be seen as resources to the connections we have. Engage us and we feel empowered.
- vi. *Exclusion from active participation equals failure to learn.*
Learning requires access and the ability to contribute. Fill a conference with one-way lectures and you increase learning failure.
- vii. *WIIFM (what's in it for me) is critical.*
We want to learn subjects that have immediate relevancy to our work. If we don't get WIIFM quickly through the marketing material or at the beginning of the presentation, we disconnect and lose attention.
- viii. *Big picture first, then the details.*
We often don't return from the presenter's rabbit trails. Don't take us into the weeds as our minds are fickle. If it doesn't fit within our context and we don't understand why we need to know the information, you won't earn our attention. The details should support the big picture ideas.

ix. *Where does this new learning fit in relation to the other stuff I know?*

We rely increasingly on our prior knowledge, experiences, failures and successes. That's why listening to other adults' experiences help us build fresh frameworks for newly acquired knowledge. We like to ask others questions, especially those that have different experiences from us. It increases our attention. And we like to compare our experiences to theirs.

x. *Sell me on why I need to know this.*

We must know the why before we know the how.

xi. *We are problem-centered rather than content-oriented.*

Adults are oriented toward solving problems and making instant application. It must meet my relevancy factor. If your content doesn't resolve my issues, I don't care.

xii. *Remove the obstacles and barriers to my learning please.*

Don't turn the lights down or off during the presentation. You'll lose my attention and I want to see to take notes or type. (Like it or not, our vision and hearing decline as we age). Pay attention to the surrounding environment. Are there physical objects that limit my view? Are there any other environmental factors that will create a barrier to learning through the five senses? Can I see the faces of other participants or just the back of their heads?

xiii. *Repetition increases my retention of critical information.*

Use common experiences to relate new and difficult information. It provides a bridge to familiar encounters. Short term memory decreases with age. The more critical learning points need to be repeated in a variety of ways so, it will move from short to long term memory.

xiv. *Let me decide how I'll learn it.*

Informal learning is critical. I'll get bored quickly if you expect me to sit through another panel dialogue or another half-hour of a talking head. Provide me with options on learning it. If I want to passively sit and check-out, that's because I've been up too late the night before, or I've reached my saturation level. On the other hand, I prefer to be actively involved. And as far as I'm concerned, you as the presenter are guilty until proven innocent. If you use activity to promote involvement, it stimulates interest, retention and I'll trust you more.

Attachment C – Three types of Adult Learners

Conference education sessions must provide a variety of informal and formal learning opportunities for the following three types of adult learner. Here are the expectations of those learners based on their level of experience.

Novice workers 1-5 years	Mature 6-10 years	Experienced 11 years or more
<i>Directed</i>	<i>Self-Directed</i>	<i>Helping Others</i>
Class	Discovery	Coaching
Course	Searching (Google)	Mentoring
Lecture	Trial-and-error	Storytelling
Test/Exam	Collaborating	Giving Feedback
1 Right Answer	Asking	Nurturing
Curriculum	Skimming	Modeling
Listening	Observing	Reflecting
Instructions	Conversing	Connecting

Jay Cross, Working Smarter, Informal Learning In The Clouds

Attachment D – Sample Submission Decline Letter

Date

<<insert name >>

<<insert address>>

Dear<<insert informal>>:

We appreciate your interest in speaking for the American Association of Law Libraries 2012 Annual Meeting. During the past month, we have been in the process of selecting topics and presenters. Some of the criteria we use to evaluate proposals and subject matter include:

- Program content and quality
- Adult learning techniques used
- Variety within a program track
- Balance between basic, intermediate and advanced-level programs
- Direct correlation between program topic and AALL member learning desires
- Timeliness and practicality of topic
- Frequency of speaker exposure at previous AALL programs

This year we received over ___ submissions to fill 66 education sessions. Many proposals were of interest to the Annual Meeting Program Committee (AMPC) and it was a difficult process to narrow down the choices.

While we were impressed with your proposal, I regret to inform you that your submission titled, _____, has not been selected. It is possible, however, that it would better fit into a future AALL program. We will keep your information on file for another two years.

AALL is committed to quality and diversity for its continuing-education offerings. We value our opportunities to work with you and hope you will continue to respond to our requests for proposals. Thank you.

Sincerely,

Name

Title

Attachment E – Sample Speaker Agreement

American Association of Law Libraries

SPEAKER AGREEMENT

THIS AGREEMENT, made this [DATE], by and between the American Association of Law Libraries (“AALL”), a professional association with offices at 105 W Adams, Suite 3300, Chicago, IL 60603 and **Speaker Name (“SPEAKER”), Street Address, City, State Zip, Phone, Email.**

AALL was founded to promote and enhance the value of law libraries to the legal and public communities, to foster the profession of law librarianship, and to provide leadership in the field of legal information. **AALL** is the representative and recognized resource of the law library industry and aims to provide the industry with education and networking programs.

The parties agree as follows:

I. Scope of Work

In consideration for compensation under Section III, **SPEAKER** agrees to prepare, present and discuss information and/or materials for the following:

AALL 2012 – 105th Annual Meeting & Conference – Boston, MA

- *Session Title, Day, Date, Start time – End time*

II. Term and Project Schedule

The presentation services under this contract shall begin upon execution of this Agreement by both parties and be completed according to the following schedule, unless other dates are mutually agreed to between the parties in writing:

AALL 2012 – 105th Annual Meeting & Conference – Boston, MA

- *Session Title, Day, Date, Start time – End time*

as requested by **AALL**.

It is understood and agreed that time is of the essence with respect to the timely approvals by **AALL** and to the services provided by **SPEAKER** hereunder.

SPEAKER shall not defame, slander or libel any person, firm or corporation and

present sessions according to **AALL** Speaker Guidelines, and shall not denigrate **AALL**, its programs or representatives in any manner.

SPEAKER agrees and states that all materials and content presented by **SPEAKER** do not infringe or violate any copyright, trademark, patent or intellectual property rights of any person or entity, nor do they promote or endorse any product, service, or device, which may or is at the time of the program not approved by any governing agency.

SPEAKER shall not sell or promote any particular product or service at any time during the session presentation. If **SPEAKER** desires to sell a self-authored book, **SPEAKER** shall first receive approval from **AALL** upon such terms and conditions as may be agreed upon.

III. Compensation

AALL will provide **SPEAKER**, for his/her services:

- **\$500 Stipend** (to be paid within fourteen (14) days after the presentation(s))
- Free Conference Registration
- One roundtrip coach ticket purchased at least 21 days in advance and for the difference between the speaker's hometown and Boston, MA not to exceed \$450. Tickets in excess of \$450 must receive pre-approval.
- **AALL** will also pay for single room accommodation for up to two (2) nights. Hotel will be advised to direct bill **AALL**'s master account for room and tax.
- During **SPEAKER**'s stay at the hotel, **AALL** will provide **SPEAKER** with the cost of meals up to a maximum of \$55.00 per day (including tax and tip), for a maximum of three days, based on submitted receipts. For reimbursement of expenses, **SPEAKER** must submit copies of receipts.
- All incidental expenses are the **SPEAKER**'s responsibility. Any expense items not specified are expressly excluded, (e.g., reproduction of handouts by speaker, slides, promotional pieces, buttons, promo kits, session aids not specified on A/V form, room service, phone calls, laundry, dry cleaning, in-room movies, entertainment, and transportation.)
- **SPEAKER** must submit copies of all receipts for reimbursement.

IV. Presentation Equipment

AALL shall furnish an LCD projector, screen and a microphone. If other equipment is needed, it must be requested and approved in advance by **AALL**. **SPEAKER** will provide

a master copy of all presentation materials at no cost to **AALL**. **SPEAKER** will furnish original copies of participant handout materials and PowerPoint presentations no later than:

- **June 14, 2012**

V. AALL Contact

The **AALL** Director of Education, Celeste Smith, is contact and **AALL's** Executive Director, Kate Hagan is representative for this Agreement.

VI. Audio/Video Recording

Speaker grants to **AALL** and its sub-licensees the following rights:

A. A non-exclusive license to (a.) record and reproduce in any format **Speaker's** presentation ("Presentation") and to edit such at **AALL's** discretion; and (b.) reproduce or distribute such recordings for distribution, sale, archival or other purposes; and

B. The right (a.) to reproduce and distribute in any format or media any handout materials or other materials which you make available as a supplement to your Presentation ("Materials"); and (b.) to include the Materials individually or as part of a collective work distributed before, during or after the Meeting, including, but not limited to, on the **AALL** Web site, AALLNET. **AALL** recommends that you attach a notice of your copyright ownership on the cover page of your Materials.

VI. Confidential Information

SPEAKER agrees to honor the confidentiality of proprietary, trade secret, or personal data provided to it by **AALL** or its member companies solely for the purpose of contributing to the accuracy of any preparation, presentation, or discussion.

VII. Independent Contractor

It is understood and agreed that in the performance of the services pursuant to this Agreement, **SPEAKER** is an independent contractor and shall not represent **AALL**, act as its agent, or otherwise enter into any contractual agreement that would commit **AALL** to a legally binding agreement. **SPEAKER** is not an employee, servant, agent, partner or joint-venturer of **AALL** at any time contemplated by this Agreement, and shall not represent **SPEAKER's** opinions to be that of **AALL**. **SPEAKER** at all times shall state that **SPEAKER's** opinions are those of **SPEAKER** and NOT those of **AALL** and that

if any media or other materials are used they shall so reflect. **SPEAKER** will be responsible for paying her/his own taxes and insurance.

VIII. Termination

This Agreement may be terminated by the mutual consent of the parties. If **SPEAKER** cancels for any reason before the above programs, **SPEAKER** forfeits aforementioned compensation. If for any reason **AALL** cancels the above program before such program is presented, **AALL** will not be obligated to provide stated benefits or fees. In addition, **AALL**, at its sole options, shall have the right to terminate this Agreement should **SPEAKER** fail to honor any of its obligations under this Agreement.

This Agreement may be terminated by the mutual consent of the parties.

- **By SPEAKER:** Upon **SPEAKER**'s receipt of Agreement signed by **AALL**, **SPEAKER** shall not cancel this engagement unless such cancellation is due to circumstances beyond the reasonable control of the **SPEAKER** or due to illness or emergency involving Speaker or a family member of the **SPEAKER**. In the event that the **SPEAKER** cancels appearance for any reason, including those outlined above, **AALL** shall be entitled to refund of any/all deposits or monies paid at the time of cancellation and shall not be responsible for payment of any compensation or reimbursement of any expenses.
- **By AALL:** Upon **SPEAKER**'s receipt of Agreement signed by **AALL** shall not cancel this engagement unless such cancellation is due to circumstances beyond the reasonable control of **AALL** or due to an Act of God or other force majeure. In the event that the **AALL** cancels this engagement for any reason, **AALL** will be responsible for payment of any/all compensation/honoraria/fees and for reimbursing **SPEAKER** for any expenses already incurred for the event at the time of cancellation.
- **In Writing:** Cancellation by either party for any reason must be presented by canceling party in writing to other party in order for cancellation to be accepted.

IX. No Assignments

No assignment of this Agreement shall be made in whole or part by either party without the written consent of the other party.

X. Force Majeure

Force majeure shall be understood as the result of any act of God, war, government regulations, disaster, civil disorder, strikes, fire, delay in transportation services, or other condition beyond the control of either party makes it illegal or impossible to perform the obligations required by this Agreement. In such event, the affected party may terminate this agreement without liability and performance will be excused for one or more of these reasons by written notice to the other party. **SPEAKER** waives any claim against **AALL** for resulting damage except that any expenditure made by **SPEAKER**, in accordance with Section II will be reimbursed.

XI. Indemnification

SPEAKER warrants that any speech presented at a **AALL** educational program and all materials used in conjunction with such speech shall not infringe any intellectual property rights of others. **SPEAKER** will indemnify **AALL** from and against all claims, including, but not limited to intellectual property infringement, copyright, damages, liabilities, expenses and judgments recovered from or asserted against **AALL** as a result of the **SPEAKER**'s presentation, materials and activities under this Agreement. **AALL** agrees to indemnify **SPEAKER** from and against all claims, damages, liabilities, expenses and judgments recovered from or asserted against **SPEAKER** as a result of participation in **AALL**'s educational program.

XII. Governing Law

This Agreement shall in all respects be governed by the law of the state of Illinois.

IN WITNESS WHEREOF, the parties have set their hands.

Kate Hagan

Executive Director, AALL

Date: 10/11/11

Speaker Name

Speaker Company

Date: _____

Make check payable to: _____

SSN or Federal Tax ID# _____

Attachment F - Peer2Peer Roundtables Facilitator Guidelines

GENERAL INFORMATION

- The PURPOSE of the Peer2Peer Roundtable Discussions is to:
 - * Share ideas with your peers.
 - * Meet other AALL members who do the same thing you do (i.e., network).
 - * Address “nuts and bolts” issues and solutions to problems.
 - * Discover resources and how to access them.
- The FUNCTION of the Facilitator is to:
 - * Promote communication from each participant at the table.
 - * Guide and direct an open and honest discussion of the topic among those at the table.
(NOTE: This is not a lecture. You’re the facilitator, not the teacher.)

THE ROUNDTABLE DISCUSSION STEPS

1. Identify yourself and explain the purpose of the discussion (see PURPOSE above).
2. Have each participant at your table introduce himself/herself with name, affiliation, title and primary job responsibility.
3. Enlist a volunteer to be a **Reporter/Scribe**...or you may choose to do this yourself.
(NOTE: This person will need to write/print legibly, as we will compile the results from each table.)
The Reporter should take notes during the discussion and create a summary of the top tips/ideas at the end. See step 7.
4. Start the discussion with the topic identified. Have each person tell one or two points they would like to discuss, related to the assigned topic. Make a list of these points, which will be the basic outline that directs the discussion. Pick common topics first for discussion.
5. REMEMBER: the goal is participation by the entire group, not instruction by a single member. Don’t let one or two people dominate; encourage those who are reluctant to contribute and ask them specific, non-threatening questions. (“What do you think? Do you have something to add?”)
6. At the conclusion, have the group quickly summarize the discussion, re-address the initial points they wanted to cover and determine 3-4 key tips, conclusions or ideas.
7. Ask the Reporter to record these summary tips/ideas on the provided Summary Sheet. Lead the table in determining ONE key point. Put this point in the box on the Scribe Sheet.
8. Leave the Scribe Summary sheet on the table. Upon completion of the program, AALL volunteers will pick up the Summary Sheets. They will be compiled and offered later online.)

TIPS

- Disagreements can occur. Keep the opinions directed at the topic and not at individuals.
- If the topic gets sidetracked, judge the value to the overall goal/topic and either continue or suggest it be addressed after this session between the interested parties.
- Thank everyone for their participation and invite them to continue the discussion after the session.

Attachment G - Peer2Peer Scribe Sheet (Roundtable Discussions)

OUR ROUNDTABLE TOPIC WAS:

OUR FACILITATOR WAS:

OUR SCRIBE WAS:

SUMMARY POINTS:

-
-
-
-
-

One KEY point drawn from our discussion:

Please fill out this sheet with 3 - 5 ideas, suggestions or conclusions gleaned from the discussion of your topic at your table.