

**YALSA Board of Directors Meeting  
ALA Annual Conference, Washington DC  
June 24 – 29, 2010**

**Topic:** Business Plan Update

**Background:** A key guiding document for the organization is an up to date Business Plan. YALSA's current business plan focuses on goals and data through the end of FY10. YALSA's Executive Director and Fiscal Officer are presenting a draft business plan for FY11 through FY13 for the Board. The business plan below was adapted from a template provided by the Nonprofit Assistance Fund.

**Action Required:** Action

---

**DRAFT BUSINESS PLAN, FY11 – FY13**

I. Executive Summary

YALSA has functioned without ALA's small division subsidy since FY05. In that time YALSA experienced significant growth and implemented new revenue streams. The onset of the recession in early FY09 has led to reduced revenues overall. The next few fiscal years are critical for YALSA and it will be important to closely monitor financial trends and market activities to ensure that YALSA is positioned to maximize revenues. Seeking ways to make the most of existing revenue streams while pursuing innovation and new opportunities must take place over the next few fiscal years.

II. Mission

The mission of the Young Adult Library Services Association (YALSA) is to advocate, promote and strengthen service to young adults as part of the continuum of total library service, and to support those who provide service to this population. The following concerns and activities are interdependent in fulfilling the goal of YALSA:

- Advocates the young adult's right to free and equal access to materials and services, and assists librarians in handling problems of such access.
- Evaluates and promotes materials of interest to adolescents through special services, programs and publications, except for those materials designed specifically for curriculum use.
- Identifies research needs related to young adult service and communicates those needs to the library academic community in order to activate research projects.
- Stimulates and promotes the development of librarians and other staff working with

- Represents the interests of librarians and staff working with young adults to all relevant agencies, governmental or private, and industries that serve young adults as clients or consumers.
- Creates and maintains communication links with other units of ALA whose developments affect service to young adults.

### III. Background & Structure

#### **Background**

YALSA, with over 5,400 members, is the fourth largest division of the American Library Association (ALA), the oldest and largest library associa

was up significantly from the 11% reported in a 1994 NCES survey. Recent anecdotal evidence, however, has suggested that teen services are suffering from the “last hired, first fired” scenario in the recession. According to the 2009 State of America’s Libraries, about half of the schools in the US employ a certified school librarian, a number that shrank under No Child Left Behind, and due to the recession, may not rebound soon.

Secondary markets include professors of library and information science, educators, library generalists, youth or children’s services librarians in public libraries and librarians overseas. The first two audiences seem to be static, but library generalists and youth services librarians could increase as libraries consolidate positions and/or reduce staff. Librarians overseas are a limited market, because most libraries in foreign countries, with the exception of a few, lack a focus on teen services.

### **Customer Characteristics, Needs & Buying Factors**

-



**YALSA Board of Directors – Annual 2010  
Business Plan Update**

- **Periodicals:** *School Library Journal* and *VOYA* are the two main competitors for YALSA's quarterly print journal, *Young Adult Library Services*. The recent sale of both magazines brings some uncertainty to their future direction and place in the market. *School Library Journal* also produces e-newsletters, which compete with YALSA's e-newsletter, *YAttitudes*.
- **Publications** (book length): Recent changes in staff at ALA Editions and Neal-Schuman have made them more competitive in publishing works for librarians who serve young adults. Greenwood Publishing Group, Linworth, Thompson Gale and Scarecrow Press are other competitors.
- **Teen Read Week™ & Teen Tech Week™ products** (posters, bookmarks, etc.): our

reduced revenues from ticketed events. YALSA may need to scale back or eliminate some ticketed events and focus efforts on other opportunities with more revenue generating potential.

- **Young Adult Literature Symposium:** With members indicating that they value face-to-face learning opportunities, but have limited funds for traveling to national conferences, there may be an opportunity to hold the Young Adult Literature Symposium annually instead of every other year.

## VI. Products and Services

### **Description**

- **Book Award Seals** – seals are primarily sold in bulk to publishers, but are also available to librarians through the ALA Graphics catalog. Seal sales are assessed at 50% of the ALA overhead rate. YALSA sells seals for five of its six annual awards:
  - Edwards: for significant and lasting contribution to YA literature by an author (honors an author as well as a specific body of his/her works)
  - Morris: for a first time author writing for young adults
  - Nonfiction: for factual works written for young adults
  - Odyssey: for best audiobook production for youth (partner with ALSC)
  - Printz: for best young adult book in a given year
- **Continuing Education**
  - **E-Courses** – YALSA offers three sessions per year: winter, summer and fall, with a minimum of two different course offerings per session. Courses provide 10 contact hours. Pricing is set at \$135 for YALSA members, \$175 for ALA members and \$195 for nonmembers. Organizations can license at 25 seat e-course for \$3,375. At ALA e-courses are assessed at half of ALA's overhead rate.
  - **Licensed Institutes** – YALSA currently has four licensed institutes that are offered at a fee of \$4,500 per institute.
  - **Webinars**
- **Membership dues** – In order to be a member of YALSA, one must first join ALA. As of FY11, personal YALSA member dues are \$50, while retired and student YALSA members pay \$20. Organizational and corporate dues rates for YALSA members are \$60. YALSA's Program Coordinator for Membership has recently updated the list of member features and benefits. For example, a new benefit for FY10 is free access to archived webinars (2 months after they are presented live).
- **Periodicals (ads & subscriptions)** – YALSA works with an ad representative to sell ads for all of these periodicals. Ad sales for publications that are a prerequisite of membership are not subject to ALA overhead charges.
  - All YALSA members receive a subscription to *Young Adult Library Services* as a prerequisite of membership, although subscriptions are also available for \$50 per year (subscriptions are assessed at half of the ALA overhead rate). The journal serves as a vehicle for continuing education for librarians working with teens, as a showcase for current best practices in this specialty, and as a spotlight for significant activities and programs of the association.









Marketing the titles is a joint effort between YALSA and the publishing house. Over the next few years YALSA will target the library school market in an effort to increase sales through the possible adoption of YALSA titles as graduate school texts.

- **Teen Read Week™ & Teen Tech Week™:**
  - Corporate Sponsorships will be vigorously sought in collaboration with ALA’s Development Office. Relationships stemming from this activity should be prudently nurtured to maximize long-term participation. In 2010 YALSA’s Board of Directors is examining its role in seeking and maintaining sponsorships and partnerships. An expanded Board role could help YALSA secure future sponsorships and partnerships.
  - Product sales have dropped significantly during the recession. YALSA will continue to work with ALA Graphics to monitor sales and explore ways to increase revenue.
  
- **Ticketed Events at Conferences:** Attendance at Midwinter Institutes and Annual Pre-Conferences has slipped steadily over the past few years. At the same time, the overhead rate set by ALA has increased. YALSA leaders will continue to monitor the situation, and make adjustments as needed. It may be that ticketed events will no longer be a significant revenue stream for YALSA.
  
- **Young Adult Literature Symposium:** The first symposium in 2008 did generate revenue for YALSA. The 2010 symposium is a concern because the recession has meant fewer travel dollars for librarians. At the same time, the overhead rate set by ALA has increased. It is possible that the 2010 symposium may generate less revenue than the 2008 event. In order to ensure the event stays fiscally viable, the symposium will be analyzed for revenue generating opportunities, including publications and use of the event to promote YALSA’s related products and awards.

**Net Sales History**

	<b>FY06</b>	<b>FY07</b>	<b>FY08</b>	<b>FY09</b>	<b>FY10*</b>
<b>Award seals</b>	20,987	23,116	9,912	36,876	63,151
<b>Dues</b>	153,509	183,484	213,459	216,082	221,986
<b>E-courses</b>	32,659	18,081	28,506	18,427	4,123
<b>Webinars</b>	N/A	N/A	N/A	N/A	500
<b>Licensed Institutes</b>	6,300	9,600	4,000	9,500	12,000
<b>Periodicals</b>	(42,634)	(37,182)	(13,856)	(24,540)	(12,337)
<b>Publications (books)</b>	7,268	8,436	10,758	1,676	25,045
<b>Teen Read Week &amp; Teen Tech Week</b>	49,901	68,609	85,815	9,464	8,000
<b>Ticketed conference events</b>	36,573	41,228	42,101	32,289	13,300
<b>Symposium</b>	N/A	N/A	N/A	24,241	N/A

\*estimated

## VIII. Operations

### **Personnel**

YALSA's day-to-day operations are managed by a staff of 5.0 FTE: a Communications Specialist, an Executive Director II, a Program Coordinator for Membership, a Program Officer for Conferences and Events, and a Program Officer for Continuing Education.

### **Organizational Structure**

The body that determines the goals and objectives of the YALSA is an elected Board of Directors, elected by/from the YALSA membership. YALSA is guided by a set of bylaws that are periodically reviewed by the Board.

ALA also has a high level of responsibility for assisting YALSA in achieving its goals. As a division of ALA, YALSA is "inextricably interrelated in structure, personnel, resources, overall mission, and operations." [ALA Handbook of Organization, 2002 – ALA Policy Manual Section 6.4.1 (I)] This responsibility is seen most visibly in the financial relationship between the two entities but is most prevalent in other areas. As a division, YALSA exists to fulfill the needs and interests of ALA members who work with and/or advocate for teen library patrons and voluntarily select YALSA membership. No other ALA division fulfills this need exclusively, yet over 5,400 ALA members rely on YALSA's efforts. ALA recognizes YALSA's purpose by supporting its operations, providing "tangible evidence of its recognition of the importance" [ibid] of YALSA. Lastly, YALSA's efforts are ALA's efforts. Whether through its publications, programming efforts, conference activities, or statement of responsibility, YALSA serves ALA and helps fulfill the overall mission of the organization. ALA, in turn, supports YALSA, as outlined in the Operating Agreement.

### **IX. Financials**

YALSA finances are subject to ALA policy 6.4.1, Section V. ALA Council has assigned specific responsibilities to Divisions. To carry out these responsibilities, each Division requires a base of operating revenue.

Subsidy							
---------	--	--	--	--	--	--	--

\*estimated

### Morris Endowment

	FY 2004	FY 2005	FY 2006	FY2007	FY2008	FY2009	FY2010*
Interest	\$8,000	\$52,619	\$27,000	49,715	(39,924)	(61,848)	104,040
Net Asset Balance	\$408,000	\$454,622	\$518,000	593,503	569,091	525,981	630,021

\*estimated

Total interest through the third quarter of FY10: \$118,098

Average annual interest: \$16, 871

### Leadership Restricted Fund (formerly referred to as Leadership Endowment)

	FY2009	FY2010*
Interest	N/A	1,783
Net Asset Balance	N/A	39,405

\*estimated

## **X. Evaluation & Assessment**

### **Goals**

**For the next three years YALSA's financial goals are the following:**

- Raise enough funds for the Leadership Restricted Fund so that funds can be used annually for the Board approved student scholarship and other Board approved leadership functions.
- Use interest from the Morris Endowment to support Teen Read Week and YALSA's literary awards and selected lists.
- Monitor YALSA's portfolio of e-learning offerings and make adjustments based on customer demand and changing technologies.
- Closely monitor use of YALSA's award seals and images to ensure that publishers comply with licensing agreements.
- Re-evaluate ticketed event offerings at conferences, based on trends in sales and make adjustments as needed.
- Aggressively explore new revenue generating opportunities.
- Continue member recruitment and retention efforts and determine if a change in the dues structure is warranted.
- Increase the Board role in seeking partnerships and sponsorships and aggressively pursue new opportunities.
- Explore the feasibility of new markets for existing products and services.
- Pursue appropriate grant opportunities, especially to compensate in areas where corporate sponsorships are lagging.
- Continue to roll out two or more publications each year, including self-published works.

- Explore the feasibility of selling advertising on online products, such as YALSA's blogs.
- Continue to look for cost saving opportunities and closely monitor expenses.

**Monitoring & Evaluation Strategy**

YALSA's Executive Director and Fiscal Officer will ensure the Board receives regular financial reports so that the Board is well informed and can quickly respond to changes in the market. For example, the Executive Director includes the latest financial data in her monthly management report to the Board. Each year YALSA's Board of Directors approves budget priorities, with an eye to funding projects outlined in YALSA's Strategic Plan and Action Plan.