



TO: Core Board of Directors

TOPIC: Final Report from the Core Forum Planning Committee

ACTION / INFORMATION / REPORT: REPORT

ACTION REQUESTED BY: Amanda Click & Meggan Houlihan

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Core Forum 2023

Final Report from the Core Forum Planning Committee

Amanda Click & Meggan Houlihan

Members: Amanda Click (co-chair), Meggan Houlihan (co-chair), Gina Costello, Tanya DiMaggio, John Klima, Mike Holt, Debbie Feisst, Jenny Brandon, Jordan Nielsen, Kate Ganski, Richard Guajardo, Liz Siler, Melissa Brooks, Helen Kula, Catherine Soehner, Nicole Lewis, Wendy Tressler (Board Liaison), Debbie Ehrman, Jill Dixon, Chris Larkins, Frank Skornia, Tom Ferren (Staff-Liaison), Julie Reese (Executive Director)

Summary

Core Forum 2024 took place in New Orleans, LA and was held from October 19th to 21st.

Members from the Forum Planning Committee worked together for a year to develop an in-person Forum with content and themes relevant across the division. Core's six sections and section leadership participated in the review and selection of presentations to ensure high quality content relevant to all Core members. Tom Ferren, Julie Reese and the Core Office took the lead in the event management, including site selection and contract negotiation, facility planning, budget management, project timeline, registration, sponsor/exhibitor support, marketing coordination, presenter and attendee support, and on-site management. Amanda Click and Meggan Houlihan co-chaired the Forum Planning Committee. A total of 404 people registered for Forum 2023, which is nearly double the number that attended last year. Core Forum provides a launching point for Core members to come together and attend professional development across Core. We believe the success of this event will continue to grow and it will become a staple of professional development for Core.

We recommend at least five years of in-person Forum to build up the Core brand and develop a strong following. After that time, Core staff and the Board will discuss the future of Core Forum determining if it should be an annual in person event or to offer it in alternating years with the in-person Core Forum and virtual Exchange or some other model.

Philosophy and Structure of Forum

The Forum Planning Committee modeled the program after Core Forum 2022. The 2023 Forum Planning Committee wanted to create an event that honored the city and culture of New Orleans. The main theme of the conference was "**Let the Good Times Roll.**"

The three-day event featured the following themes and topics:

Day 1 (Thursday, October 19)

We offered 3 preconferences, 3 tours, and one diamond sponsored presentation (OCLC) followed by a Welcome Reception.

Day 2 (Friday, October 20)

Day one kicked off with Keynote presentation by Dr. Mona Lisa Saloy, Poet Laureate of Louisiana, followed by 5 sets of 6 concurrent sessions totaling **40** sessions as well as an unconference and poster sessions. The day ended with a trivia night.

Day 3 (Saturday, October 21)

Day two kicked off with **4** workshops and **6** concurrent sessions followed by a keynote presentation by presentation by Ben Jaffe, Creative Director of Preservation Hall. The day continued with **3** sets of **6** concurrent sessions totaling **40** sessions as well as an unconference and poster sessions

Call for proposals went out in January. We received **106** one-hour session proposals and selected **46**. We received **39** poster session proposals. **36** posters were presented. We received **10** preconference proposals and **1** tour submission. We accepted **3** preconferences and **3** tours.

A review matrix was used by all to evaluate the proposals. Proposals were evaluated on relevance to theme, opportunities for learning, audience interactivity, equity, diversity, and inclusion, library type, and a general interest factor.

The committee selected two keynote speakers: Mona Lisa Saloy and Ben Jaffee. They are both well-known in the New Orleans community. Both of their talks fit well with the themes of the event, and we feel like the strong keynote presentations were a highlight of Core.

Based on the recommendations of Core staff, Core contracted with Hilton New Orleans Riverside hotel as the location for the Forum 2023. Frank Skornia built and supported the Forum web site. Registration was conducted through ALA.

Marketing

Marketing of Core Forum was handled in a variety of ways including email, Connect (ALA, Core, PLA, ACRL, RUSA, ALSC, AASL, IRO), American Libraries Online, Core Social Media, Listservs the Planning Committee helped identify.

Registration and Budget

The pricing for the event was increased by about 10% from the 2022 event to ensure that revenue covered expenses. We ended up with a total of **404** registrations, of that number, 132 were presenters and 35 were exhibitors. We brought in \$43,500 in sponsorship dollars, which was \$19,000 over what we had expected.

REGISTRATION FEES		
Member Type	Early Bird (Thru 9/16)	Late (9/17-10/21)
Core Member	\$329	\$369
ALA Indiv Member	\$399	\$369
Non-Member	\$499	\$569
ALA Student Member/Retiree//International	\$229	\$269
Louisiana Library Association Member	\$329	\$369

Income	Rate	# Registrants	Total
Core Member (Early) - Sept 9th	\$329	92	\$30,268
Core Member (Reg)	\$369	5	\$1,845
ALA Member (Early) - Sept 9th	\$399	28	\$11,172
ALA Member (Reg)	\$469	1	\$469
Non-Member (Early) - Sept 9th	\$499	35	\$17,465
Non-Member (Reg)	\$569	6	\$3,414
Student/Retired/International	\$229	13	\$2,977
Student//Retired/International (Reg)	\$269	1	\$269
LLA Member (Early)	\$329	11	\$3,619
LLA Member (Reg)	\$369	0	\$0
One Day Registration Fee	\$129	1	\$129
Presenter Registrations	\$199	132	\$26,268
Comp Registration	\$0	3	\$0
Keynote (Comp)	\$0	2	\$0
Press	\$0	2	\$0
Exhibitors/Sponsorship (reg incl. in tabletop purchase)	\$0	35	\$0
Planning Committee Member Discounted Fee	\$159	12	\$1,908
Planning Committee Co-Chairs (Comp)	\$0	2	\$0
Staff (Comp)	\$0	3	\$0
Total Registration Income		404	\$117,381

The Forum Planning Committee with the support from the Fundraising & Scholarship Committee worked to secure the following sponsors: OCLC as a Diamond Sponsor, EBSCO and Agati Furniture as Gold Sponsors, Gale, Lyrasis, OrangeBoy, Shepley Bulfinch, and Spacesaver as Silver Sponsors, and Backstage Library Works, Caia Software Solutions, Quipu, and Tulane

University Libraries as Bronze Sponsor. Additionally, Duke University Press, Adams Matthews, Marcive Inc, Ratio, and Sage as Exhibitors/Supporters.

Sponsorships			
Diamond	\$10,000	1	\$10,000
Platinum	\$7,500	0	\$0
Gold Sponsor	\$4,500	2	\$9,000
Silver Sponsor	\$3,000	5	\$15,000
Tulane Donation (Silver Level)	\$2,500	1	\$2,500
Bronze Sponsor	\$2,000	3	\$6,000
Lyrasis Lunch Sponsor	\$1,000	1	\$1,000
Total Sponsor Funding			\$43,500

Expenses came from the hotel for audiovisual equipment, meeting room rental and catering. Other expenses included honoraria for the keynote speakers, registration processing, and ALA overhead. Overall, the event provided a net income of **\$19,516**. With the great success of the event, we encourage the costs to be reverted to 2022 prices.

Core Forum 2023 Budget Report

	FY23 Budget	FY23 Actual	FY22 Actual
Revenues			
Registration Fees	83,000	115,131	59,344
Exhibit Sales	4,500	3,000	1,500
Donations	27,500	39,135	20,217
Total Revenues	115,000	157,266	81,061
Expenses			
Professional Services	500	1,430	0
Bank S/C	2,000	2,095	1,509
Transportation	1,700	2,761	560
Lodging & Meals	2,000	3,863	1,345
Facilities Rental	0	1,725	5,000
Meal Functions	63,000	61,396	54,393
Speaker/Guest Honorarium	3,000	2,500	750

Special Transportation	2,000	1,765	2,336
AV Equipment Rental	20,000	21,203	21,312
Printing Outside	2,000	1,583	597
Supplies/Production	500	361	306
Supplies/Operating	0	2,333	162
IUT/CPU	750	402	89
IUT/Distribution Ctr	0	12	0
IUT/Reprographics Ctr	200	190	355
IUT/Registration Processing	2,300	*2,825	0
IUT/Overhead to ALA	23,188	31,305	8,062
Total Expenses	123,138	137,750	96,776
Surplus/ (Deficit) From Operations	(-8,138)	19,516	(-\$15,715)

**The registration processing charge is expected to appear on a future FY24 budget report.*

Best of Core Forum Webinar Series

To extend the reach of Forum and make it accessible to all members, attendees voted on their Best of Core Forum sessions which are being presented as live webinars in the months following the event. The webinars are free to all Core Forum 2023 attendees. All others are welcome to register for a webinar at a rate of \$58 Core members, \$71 ALA member, and \$79 non-members.

Estimated Number of Webinars in the Series: 24

Estimated Total Revenue: \$30,000

Estimated Total Attendance: 1,400

Core Forum 2023 Attendee Evaluation

Following the Forum, all speakers and participants were invited to participate in an evaluation. Out of **404** attendees, **86** responded. At under **5%** percent, the response rate for participants was low enough it's hard to draw any meaningful conclusions for Forum participants as a whole. It is worth noting that in the participant survey, the majority of respondents were satisfied or extremely satisfied with the Forum and offered many positive comments.

A sample of "What did you enjoy most about Core Forum 2023?" includes:

- The content was excellent and I had the opportunity to connect with new folks.

- A good number of sessions were geared towards public libraries which is not seen in many conferences.
- I appreciated the range of topics. Many library conferences swing either public or academic. I felt there was a good mix and I think everyone appreciated that in discussions. And the size. Not huge.
- The focus on leadership and infrastructure is so valuable and many of the sessions I attended were very well presented and had a lot of value.
- The sessions were incredibly informative. I really appreciated learning from colleagues across the country.
- I enjoyed the mix of leadership, technology, and cataloging/metadata sessions. I was able to pick and choose the sessions that best suited my career.
- Really good subject matter - covered all aspects of Core. I went to sessions in every track.
- This was a rare library conference where I had too many choices during the concurrent sessions. Every session I attended I was able to take something back to my place of work.
- I liked that it was in a big city with an airport. Even though I drove, I think it's important for these conferences to be accessible.
- I loved having a high quality conference that was focused on my interests rather than lots of topics outside my focus area. I loved loved loved both of the Keynotes! I loved being in New Orleans.
- I really appreciated the local connections of the keynotes. I also thought the conference was a good size both in terms of number of attendees and number of sessions.
- The size of Core Forum is manageable and a great alternative to big conferences like ALA.
- The pre-conferences on leadership, especially the one about Having difficult conversations was excellent.
- The awesome and encouraging keynotes.
- Posters were great.

A sample of "What would you change to improve next year's Forum event?" includes:

- Would be better for conference to end a little earlier Saturday.
- The Saturday session was clearly underattended. Maybe change the dates to Thursday/Friday for the main Forum.
- Vendors seemed disconnected from conference. We need to provide more opportunities for them to engage with attendees.
- Try to include a public library viewpoint in programs when possible. So many of the sessions were very specifically academic.
- More cataloging sessions would be welcome. There were not many catalogers there. Catalogers used to make up a huge part of ALCTS. I don't see many of them attending Core events because they don't see programming for them.
- I'm excited for Minneapolis. I'd love to see a greater focus on leadership and management. I liked that the leadership pre conference was offered.

- More networking opportunities that are maybe more formal. Breakouts for public library directors, etc.
- Lunch onsite at least one day would be a good thing. Perhaps a vendor could give a talk and sponsor the lunch?
- Better website with conference app
- More Academic Library content
- More synthesis of the topics each day. The conference needs a thought leader or key presence to facilitate general sessions to draw attention to hot topics.
- It feels like there needs to be more effort to create networking and relationship building opportunities. As a new division and after COVID, I simply don't know many people which reduces my sense of connectedness to Core.
- Would love to see more technology talks solicited.
- I would love to see more preservation-related sessions and posters. Now that the Preservation section has formed, it may be worth reaching out to Preservation committees and interest groups to encourage members to submit proposals.
- The cost of the Forum was quite high, even as a presenter.
- My colleague and I put hours into the prep plus airfare, hotel, meals, taxi fares on all ends, and we are not reimbursed by a library system.
- You need to have a presenter on safety and security specific

Testimonials

The following attendee testimonials collected on the Core Forum 2023 participant evaluations illustrates the high value Core Forum provides to members and the potential for further financial success and growth in coming years:

- Attending Core Forum was a transformative journey. Don't miss your chance to be part of this incredible experience!
- The organization of and the quality of the programming at the 2023 ALA Core Forum were among the highest I have experienced in nearly 30 years of attending Library conferences.
- The size and scope of Core Forum are perfect for networking and learning. The more targeted content and smaller session sizes make it a great alternative to bigger conferences.
- Every session block had something relevant to my work in a public library. I enjoyed sharing meals and getting to know some librarians from across the country.
- Core Forum provides me with an amazing opportunity to network and learn from other leaders and Library professionals. Core is a community of individuals that support our Libraries and do the heavy lifting behind the scenes.
- I loved having a high-quality conference that was focused on my interests rather than lots of topics outside my focus area.
- "You got to come to Core Forum! It's the best conference ALA has to offer!"

The full surveys are archived on the Forum Planning Committee Connect site for future groups to review comments and suggestions.

Recommendations for the next Core Forum:

The committee provided feedback on their thoughts on changes to the Core Forum 2023 Committee should consider. They include:

- Continue to recruit volunteers for specific duties such as: Sessions, Poster Sessions, Sponsorship/Exhibits, Local Arrangements, Preconferences, etc.
- Collect all presentation materials and make them accessible during and after the conference.
- Ensure that a conference evaluation form is created and distributed.
- Continue to assign room monitors to create a welcoming environment.
- Do not start any sessions earlier than 8:30 am.
- Ensure all rooms have the correct number of microphones. This is an equity issue.
- Continue to find local keynote speakers who speak to the culture and livelihood of the host city.
- Continue to host dine arounds and have sign-up sheets available.
- Make sure that there is intentional scheduling of public, school, and special libraries during all concurrent sessions.
- Continue to host free tours. They were a crowd pleaser.
- Sponsorships: Sponsors are very interested in supporting the Forum. Add more opportunities and increase the dollar amount per level.
- Committee communication needs to be improved. Use Slack and a joint email account to keep everyone informed.
- The website needs to be improved and reimagined. Consider moving to Sched.