>> SPEAKER: Hey.   I'm Karla, and I'm the chair of the ALCTS Exchange Working Group, and, um, especially for parts of our conversation today, I think it's also worth saying that I'm also an associate director at the Ohio State University Libraries, and, so, um, we're also a participant in the Exchange. So, this is a really exciting session for Keri and I, because we get to reflect a little bit on what we've learned from the experience of creating the ALCTS Exchange and how we hope to take those learnings into the future for ALCTS, and in my case, into my professional engagement and my support of professional development at Ohio State.

>> SPEAKER: So, I'm going to do a little bit of an introduction for ALCTS.   Karla will talk about the values that really sat behind the planning for us when we were creating the Exchange, and then we're going to be joined at the end by Vicky, our current President of ALCTS for a little bit more of a conversation about what we've learned, what we think success means, and how this experience is going to shape our future.   So, ALCTS and continuing education, we are a membership organization, and we're focused specifically on collections and technical services, but I would also say maybe non-specifically, we are probably the only nationwide membership organization that has all of these different things in our mission.   We talk about acquisitions and licensing, cataloging and meta data, collection development, management, scholarly communication, continuing resources and serials, and, of course, preservation and digitization, and I always like to say and digital preservation   So, when we do education, we try to bring all of these to the community, to the greater library community, and we really don't have a very specific focus, we want to get more general.   It's been really interesting in all the sessions that we've done with the Exchange to see how none of these are really siloed anymore. Any choice that we make in any of these areas in our libraries affect each other and then affect our public services and the communities that we serve.   So, what has ALCTS done with continuing education over the years?   We started with in-person events and regional institutes, and many of you have probably been to some.   I've been to some where we would license the material, we'd get a presenter in, and for a day or two, we'd do really intense workshops on broader topics, cataloging workshops, acquisitions, all of those things, and in 2001, our first web course was created from our fundamental of acquisitions course, and that really started us on this road that you see here.   So, we started with our web courses in 2001, and then it probably took us till about 2008 to really build and add the ones that we have today.

The most recent one we had added was fundamentals of cataloging, and I will say that we are planning on launching fundamentals of meta data later this summer, so take a look for that.   Webinars was kind of our next step, and we started those, um, in 2008 and moved that forward and really ramped it up in 2010.   So, in 2008, the topic was demystifying library standards, that's the first one we did.   I feel like we could do that same session today, maybe with slightly different standards under the hood, and we also in 2008 started our e-forums, and e-forums were important to us because it's an online discussion, we use a list serve for that, and we really wanted to lower the barrier for participation. There's no cost to it, almost everybody can get an e-mail system and get on the list serve, and it was important to us to bring topics to the broader community.   Again, technical services really does reach everywhere and affect everybody in libraries, and at this point, we have over 4,000 registrants for that list serve, and it's growing all the time, so we think it's been really successful.   We keep moving down this line.   In 2012, we started putting our pre-conferences and symposiums online, and then, um, that

really brings us to the Exchange today.   So, our goal has always been to kind of repurpose all of our content.   A conference presentation might become a webinar, a, um, article might become a conference presentation.   We really try to get that broader audience, but I will say, through all of this, all of our continuing education, including the Exchange program that we've put on over the last few weeks, is a really volunteer-heavy process.   The ALCTS office, we supply the framework, and we're here for support, but it's really the ALCTS members who find this content, and members and even non-members who create the content for us and lead our courses, webinars and workshops, so that is something I never want to lose sight of.   So, why did we move into the Exchange after all of these years?   You know, probably a good, more than 10, 15 years of other online activities.   I would say, you know, there's no national forum for technical services at large.   We did not want to do an in-person forum, we thought it's kind of difficult right now for people to travel, and the costs are kind of high to do those sorts of things, and we figured we'd just reach more people if we can do this online, and, so, we wanted to get an accessible continuing education opportunity, allow people professional development, both in presenting and in attending, and this is a little bit different than what we've seen in other conferences, where there's an in-person conference, and then you can then get the archive in addition to it.

In this case, all of this content was born digital, so, um, everything we've done here has been online with no in-person component, and it's been quite a different model, even for the, um, learning times, which is the technical people behind the screen here who are making all of this go, and we really appreciate the work that they've put into this.   So, we've been able to engage with people at different levels and in different areas of practice in technical services and in public services.   We hope that you've brought other people to the table in these conversations and that you might be bringing them to the table in later conversations with something that sparked your interest during the Exchange.   This also allowed us to think on that broader scale about how technical services supports each of your organizations in supporting your users.   I think that came up over and over again, how important our communities are in the work that we do.   Lastly, we're celebrating our 60th anniversary this year.   It just seemed like a good time to try something different and to push some of those boundaries, to celebrate that anniversary year, so that's another reason why the Exchange came about now.   So, I'm going to move this over now to Karla to talk about some of the values that were behind the scenes when we were planning the programming for the Exchange.

>> SPEAKER: Thanks, Keri.   So, just want to highlight that the Working Group members, when we started this journey, we all agreed to serve on the Working Group in January of 2016, and, you know, ALCTS decided it wanted to do an Exchange, and we decided that we were going to be the folks who tried to really help figure out what that would look like, but, you know, really, we did not know what we were working on, so we talked a lot about our goals, and we started with a goal statement that, um, evolved a little bit over time, and, basically, is very much reflected in the, um, statement on the home page of the Exchange site, but looking back, we certainly had many goals, but what really shaped our decisions about the Exchange at bottom were this set of shared values, and, you know, whenever we kind of got to crossroads and said, whoa, what are we doing here, and what's the way that we should think about this, I think it was these values that really helped us collectively see our way forward here, and I will say that I wish, when I first thought about this session, I thought, oh, wouldn't it be great if all

the Working Group members could be here with us, and we realized that just wasn't practical, but I hope that all of the other members of the Working Group are able to be here and contributing to this conversation at least in spirit.   So, when we started out, I think, in some ways, our biggest touch stone was thinking about inclusivity.   It was very important to us that this event, in some way, even the playing field for librarians and for other colleagues who work with us in libraries, and we really wanted to be able to bring into dialogue people who cannot or just choose not to attend face-to-face events and people who do attend the face-to-face events.   We didn't want this just to be for people who don't come to conference, and we really wanted to offer things that people who do come to conference, they still find something unique and valuable in the Exchange experience.

We also talked a lot about wanting to enable contributions to come from many places.   We didn't want it just to be a showcase for ALCTS members, and I was very pleased to here a couple of our presenters today talking about how ALCTS was not their normal go-to community, and that makes me very happy, that we have many members who are very involved with ALCTS, but we also have some who came from other places, and that's because we really wanted the proposal process to be wide open, and we wanted to encourage an advanced diversity in every dimension when we were developing the program, and we wanted to, also, we thought about how could we help not just people speak from the front of the room, but how could we enable the audience to contribute and create dialogue in the Exchange experience.   Ultimately, we really wanted to bring many voices to the front of the room in ways that we hope the digital environment might allow us to do things that we actually couldn't do in a face-to-face meeting.   You know, and then, pretty quickly from the beginning of our meetings, we committed to working fully virtually throughout the planning process.   We knew this was going to be a fully virtual event, and we wanted to model that from the beginning in the Working Group's way of interacting with each other, and we've gotten to the end here, and I can say that we have done all of our work in virtual online meetings.   We have not had a face-to-face meeting.   We've had some informal get-togethers among different members of the Working Group, but we've done all the Exchange planning work online, and that reflects our commitment to learn by doing, but, you know, as we got a little further into the planning, we realized there was a real challenge facing us in thinking about a virtual meeting.   You know, when we thought about our experiences, when we looked at other experiences, we realized there's a really strong tendency to use the minimum of the functionality available to us in these, um, online meeting platforms, and that there's, in some ways, a real pressure to avoid risk-taking and avoid, you know, to not make, um, set expectations for our program developers or our audience members, that they be really comfortable online or be comfortable learning to use online functionality, and, so, um, probably about a year ago, we realized that we would really need to visibly embrace interactivity in our program planning, in our program development, and in our marketing, that this wasn't just about us on the Working Group learning and growing into this space, we needed to, um, expect ourselves and everyone involved to actually use more functions in the virtual meeting experience, we needed to use things like polls and surveys, prerecorded content, and we just needed to consistently raise expectations around the Exchange instead of lowering them.

That also led to us, I think, realizing that we needed to be investing not just in planning a program, but in educating program developers, and even engaging our group coordinators and understanding how they could help their group members be active participants.   We really needed to help everyone learn what

it meant to be engaged rather than just passive viewers of video content coming at you on the screen. Keri also, I think, pointed a little bit to, especially when we got involved with the 60th anniversary message, um, the innovation also was really something that we wanted to demonstrate through the ALCTS Exchange, that we really wanted to send a message about how ALCTS is, um, thinking about new and different, and early on, as we thought about our program and we came up with our unique four-day timezone friendly structure, we went further, even, and the Working Group members really embraced change in the future through our themes, and as we were going through the program development, how we structured the program in every session.   We really tried to model experimentation and risk-taking in our event.   You know, we did expect to have difficulties and to overcome them.   Not a full-blown crash of the Exchange, but lots of little difficulties that we'd need to deal with.   So, one aspect of this that's just been absolutely delightful has been the response of our program developers, you know, because we put our calls out there, and we hoped that people would respond, but they just really have been fantastic.   The people who have created content for the Exchange have really jumped onboard with the idea of trying new things and doing things differently, and again, I was so delighted earlier this afternoon, for me on the east coast, to hear one of our presenters talking about, um, proposing a program for the Exchange to help herself learn how to, um, do a virtual presentation.   One of the things that we really had to wrap our heads around as the Working Group got to work was how we were going to really set our sights on impact.   We didn't just want to have a few people attend the Exchange and have a nice experience, but we really wanted to make this, um, a transformative experience for everyone involved, whether that's us on the Working Group or for people who are developing programs or for people who are attending, and as Keri highlighted, we were very aware that ALCTS has some huge past success that we can build on, but that did require that all along the way, we had to trust the group, and I think that's really born through here, and the diversity of folks who stepped up and got engaged and all the different ways in which they've contributed, and, of course, we won't really know about our impact until, um, maybe tomorrow or the next day, when you start filling out the, um, evaluation form, which you'll hear about later on.   Um, but now that Keri and I have talked about our goals, our aims, our values for the Exchange, we want to turn to talking about what we've really learned from this experience, and to help us with that, this is where, um, we're going to be joined by Vicky, our ALCTS President, and she's going to take Keri and I through a conversation.   So, thank you, Vicky, for taking on the role of interviewer and taking Keri and I through some reflection.

>> SPEAKER: Well, thank you for inviting me, Karla and Keri, and, yeah, hello.   I'm Vicky, the President of ALCTS.   For my first question, um, we've got a slide here, but let me personalize this just a little bit more.   What have you, Keri and Karla, what have you learned from the Exchange planning experience?

>> SPEAKER: So, I'll go first.   This is Karla.   You know, it's really freeing, doing something for the first time, and I think that was a lot of why I said yes, I would like to lead the Exchange planning Working Group.   I'm a sucker for really trying something different, and I think all of the Working Group members said yes because, in some way, they found that really exciting.   You get to be creative, and you can try new things, and you can let other people step up, but, you know, at the same time, it's really hard, it turns out, doing something for the first time.   I don't know that any of us really anticipated the full level of decision-making that would be involved.   Every little thing was new and had to be thought about, and a decision had to be made, and, so, you have to be flexible, you have to be open, and I think

another thing we learned is it did take a lot of time, not just, I don't just mean like our own time, but we needed time to think things through, we needed to bring things up, maybe take some time to explore and then come back, and, so, in hindsight, I'm really grateful that we had more than a year, actually, to prepare for this event.   It might seem like, oh, we should be able to do something like this very quickly, but in fact, there was so much just to think through, that having the time was really important.   Again and again, as we went through this process and dealt with the kind of decision-making overload, I just have to say that members stepped up over and over every time.   You know, it was definitely the excitement and the challenge that kept us working, but we really had to embrace the contributions of all of the group members, and everyone contributed something different and made unique contributions, and I think, probably, everyone in the group had times where they had to dial it up and had times where they had to dial it back in different ways to address their other commitments, but collectively, it always worked.   So, I just have to say that working with the group was, and how to work with the group was really something that was amazing to learn and take away.

>> SPEAKER: Thanks, Karla.   In between here, we did get a question about the presentations, are they going to be available.   Yes, this is all going to be on the Exchange website for up to a year after, and you're going to get an informational e-mail at the end of the session, a little bit later this afternoon.   For me, what I took away was so much of what Karla said.   We did this for the first time, we were trying new things, but I was also just blown away with the commitment and the creativity of the members of the Working Group.   Each person brought something to the table, their own values, their own professional learning priorities, and they were able to translate that to programming that would benefit a wide audience, to really bring what they're interested in to others, so I think it, we made a great contribution to the technical services communities by bringing a lot of these ideas, these presenters and participants together into this space.

>> SPEAKER: Great.   Um, thank you both.   So, could we talk, maybe very briefly, about what success means?   So, Keri, maybe you could go first.

>> SPEAKER: Yeah, I mean, for me, I think it was just an opportunity to bring people who had not been able to attend conferences together in a slightly different way, whether that was the participants or the presenters.   We really wanted to try to breakdown some barriers to participation on both those sides.   So, we really wanted to, as a member organization, make this accessible with different price points and different experiences for different people.

>> SPEAKER: And I, um, got something.   For me, success means I got something, and my organization got something, and, so, I've gotten a chance to think about how to make the most of a virtual event, even while it's going on, and that's been really interesting to me.   The content is great, but it's also really important to think about how to make the most of the experience.   In my engagement with webinars, until now, I've mostly been really passive, and I can see that our library has mostly been pretty passive too, so if we want to get more out, we have to be more deliberate and sometimes put more in, but it'll be very worthwhile to do that, and it actually won't be a lot of work compared to face-to-face events, but we're going to have to step up and type into the box or log into the site early or do those kinds of things.

>> SPEAKER: Great.   Thank you.   So, for our last question here, we want to take a quick look at how this experience will shape the future, and Karla, let me ask you, first up, how has the Exchange experience shaped your view of virtual engagement?

>> SPEAKER: Yeah, so, um, I'm really changing my virtual meeting behavior now.   I'm now really prepared to speak up into my mic, to have my camera on, to share my screen.   I've actually started using our local Adobe Connect system for meetings with consultants and projects with people in other locations, and, actually, I'm going to be looking for more professional opportunities where I don't have to do as much travel, so, um, I want to be looking for opportunities to work from my desk, and I'm going to be working to support other people at the Ohio State Libraries and in the profession as we all try to do more of our work and learning virtually.

>> SPEAKER: Great.   So, Keri, how do you think ALCTS will be able to use what it's learned from the Exchange experience?

>> SPEAKER: I think we'll be able to engage the interest we got in something like this.   This was a very broad event, it wasn't just for serials, just for meta data and cataloging, and then see how we can make some of our smaller, more tailored online events that we already have to not just be a webinar.   Really would like to bring some engagement to participants other than just using a poll within a webinar.   So, we're going to be looking at what we've learned from this and, um, I think it's going to be really interesting to see how this engagement has worked.

>> SPEAKER: Great.   Okay.   Well, thank you, Keri and Karla.   It really has been a pleasure, hearing your behind-the-scenes views of the Exchange.   I want to encourage our participants to continue the conversation with Keri and Karla in the discussion forum for this session, and you also have their e-mail addresses, so please feel free to drop them a line or ask them a question for more background information on how this monster of a program got put together.   My head is stuffed, I got to tell you. Um, so, the time has come, really, to wrap-up the live stream portion of the ALCTS Exchange, so we're going to transition here shortly to, um, our last few slides.   I want to just say right up top that I'm just, I'm really pleased to say that as ALCTS celebrates its diamond anniversary, the Exchange really truly has showcased the talents of our organization and our community.   It's highlighted what is best about ALCTS.   We've really lived up to our aspirations to embrace the past and build the future, and we also have many, many people to thank for the success of this singular event.   First up, we'd like to thank all the presenters over the four days of the Exchange.   Your thoughtful and insightful content that you've provided has enriched all of our participants, and as I said, my brain is stuffed, and I really thank you for that.   Next up, I'd like to take a moment and thank all the members of the Working Group and all the members of the ALCTS staff.   I want to thank you, because your work, your creativity, your energy, and your dedication have created this event, and it's allowed our participants to engage in new ways, it's allowed me to get a lot of information that I probably wouldn't have put my nose up against before this, so I'm grateful to you for all your service and commitment to ALCTS.   Thank you.   I'd also like to thank our sponsors for their generous support of the ALCTS Exchange.   Our heartfelt thanks go out to them for their support.   We really do appreciate your support.   Thank you.   Now, the Exchange will still be available.   This live stream is about to end, but the remainder of the material will be active after we close the live stream.   Please continue the conversation through the discussion forums for each of the

sessions on the ALCTS Exchange website, and in the forums, you can continue to engage with our presenters when the surveys, the group discussion guides, etc., there's a lot of really wonderful material there.   If you hadn't had a chance to look at it during the course of the live stream, please avail yourself of it.

Now, as we all know, assessment helps us with learning, and all registrants will soon receive an e-mail from the ALCTS office with a link to a survey to help us understand how the Exchange experience worked for you, and we really are interested in that.   We want to keep learning from this celebration, and your feedback via our evaluation survey will be essential for that.   Also included in the e-mail will be a certificate of attendance that participants can complete and print, as well as a link to a digital participation badge that you can display in your online networking spaces, so be on the lookout for that information.   It'll be coming to you in the form of an e-mail.   You'll be able to continue access to our Exchange content on the attendee site well into the future.   The site will be live for a year after the Exchange has opened, as Keri alluded to earlier, so keep track of your log-in, and check back periodically. The discussion forums will remain open, and presenters can arrange to be notified of new posts to keep up on any ongoing questions or discussion.   So, thank you for attending today, and please come back to visit that Exchange website.   Lastly, I just want to mention that the Exchange, as part of our anniversary celebration, it really was a grand way to celebrate   So, expand your experience with ALCTS. If this is your first time coming up against our organization and the types of things that we can offer you, please check out our other events and resources on Twitter, our website, and on Facebook.   All of those links or information is included here.   So, with that, I'd like to close, with a little bit sad at heart, the live stream for the ALCTS Exchange.   Thank you all participants for attending.   We truly appreciate the success that you've given us on this program.