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# BUSINESS REPORT

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## Atla Association Update

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**ABSTRACT** The Atla Association Update provides highlights of Atla's accomplishments for the year, an overview of finances for fiscal year 2019, and a brief preview of the projected budget for fiscal year 2020.

The past year has been an exciting one for Atla members and staff. Improved research tools, new open access publications, implementation of new membership categories, a new international learning opportunity, and the release of a stunning new website is just a sampling of Atla's many accomplishments. Highlights from the year are included in this update and additional information can be found in the committee and task force reports included in the 2019 *Atla Yearbook*.

Several new milestones were achieved regarding the enhancement of Atla research tools. Over 1,000 titles are currently indexed in Atla Religion Database. The integration of Atla Catholic Periodicals and Literature Index into Atla Religion Database was successfully completed, and Atlas PLUS now includes 56 full text titles that support Catholic research and study. The emphasis in licensing new titles over the last several years has been to further diversify full text content, which now includes publications in more than 20 languages from 35 countries. In addition to expanding the breadth of content, the depth was increased, with a specific effort made to increase the coverage of many titles back to volume 1, issue 1. This includes 71% of Atlas PLUS

titles and 69% of Atlas titles.

The most significant milestone reached is that more than 500 full-text titles are now included in Atla's research tools. In 2001, Atlas began with a core group of 50 journals. In 2013, Atla celebrated the 250<sup>th</sup> title milestone at the annual conference in Charlotte, NC. Just 6 years later, that number has now doubled!

The previous year was a busy one in terms of association activities. Atla's progress toward achieving its mission and organizational ends is made possible through the collaborative efforts of the many members who volunteer their time and the staff who coordinate their efforts.

The number of committees, councils and other volunteer groups keeps expanding. A list of all the current groups is included below. Many thanks to all of you!

- Atla Annual Conference Committee
- Committee on Diversity, Equity, and Inclusion
- Endowment Committee
- Atla Digital Library Advisory Council
- International Theological Librarianship Education Task Force
- Professional Development Committee
- Scholarly Communication Committee
- Atla Open Press Coordinating Council
- Editorial Boards
  - Monographs
  - Proceedings
  - *Theological Librarianship*
  - *Theology Cataloging Bulletin*
- PCC (NACO/SACO/CONSER) Funnels

Several special professional development opportunities were offered last year. Atla sponsored the ACRL Scholarly Communications Roadshow specifically for Atla members and offered travel grants to make attendance at this event affordable. This one-day seminar led by expert faculty provided attendees with the knowledge and skills needed to help transform the scholarly communication system. The Atla board and other members attended this event held in February 2019 in Chicago.

The International Theological Librarianship Education Task Force, which includes volunteers from around the globe, created the first

International Theological Leadership Institute. The Institute was held in Vancouver concurrent with the annual conference and included 3 participants from Fiji, the Philippines, and Ukraine. It utilized Atla members as faculty for two days of training, incorporated participant attendance at the conference and selected preconferences, and ended with visits to local theological and specialized libraries.

The Atla Open Press Monographs Editorial Board never rests! They oversaw the publication of two new open access (OA) books: *Teaching Religion in a Changing Public University* by Dr. Sandie Gravett, and *A Broadening Conversation: Classic Readings in Theological Librarianship*, edited by Melody Layton McMahon and David R. Stewart, with a new introduction written by Dr. Carisse Mickey Berryhill.

The Atla Digital Library has gained momentum and continued to expand. Eighteen institutions have agreed to have their metadata harvested for inclusion. Atla is also serving as a technology partner for a Council for Library and Information Resources (CLIR) grant, *Digitizing the Records of Philadelphia's Historic Congregations: Providing Documentation for the Political, Social and Cultural Developments in Philadelphia*, led by Christ Church Preservation Trust.

Following a survey of users, Research in Ministry (RIM) received a major refresh from staff and was converted to a new platform that supports a more user-friendly display and search capabilities, and allows authors or librarians to upload information directly.

In 2018, the Atla membership voted in changes to the membership categories. Membership categories increased from five to six, and staff spent time helping Lifetime members transition to the new categories of Retired and Emeritus.

Trends in membership is an area that the board and staff are constantly monitoring. The numerous closures and mergers of seminaries over the last decade have had an impact on Atla's membership numbers. Whenever a school closes or two schools merge, Atla loses not just an institutional member but often several individual members as well when positions are eliminated. In 2016, members voted in a new set of bylaws, which included major changes to the Institutional Member eligibility requirements that made Atla a more inclusive organization. The impact of these changes can be seen in the chart below. While the Individual Member numbers have declined, the number of Institutional Members has steadily increased.

**Atla Membership Statistics, FY13-FY19**

	<b>FY13</b>	<b>FY14</b>	<b>FY15</b>	<b>FY16</b>	<b>FY17</b>	<b>FY18</b>	<b>FY19 (June)</b>
Individual	361	368	364	377	368	342	317
Lifetime	94	87	88	91	97	94	
Retired							22
Emeritus							75
Student	87	94	75	45	57	66	78
Institutional	234	231	234	241	263	284	290
Affiliate	58	53	60	61	47	32	23
International Institutional	17	13	12	11			
<b>Total Members</b>	<b>851</b>	<b>846</b>	<b>833</b>	<b>826</b>	<b>832</b>	<b>818</b>	<b>805</b>

International membership of both organizations and people has been growing as well. Organizational members from outside the US increased from just over 4% in 2015 to over 12% in 2019. Personal members from outside the US increased from 8% to around 13% during that same period. This year's annual conference also showed an increase in attendees from outside the US, a result of both the creation of the Leadership Institute mentioned above and the conference location in Canada.

A status report on the financial picture is always an important part of the Association Update each year. Atla is in a strong position now, but care is always taken to ensure future financial sustainability. The Endowment Fund was created for this purpose and it has continued to grow. As of August 31, 2018 (the end of the last full fiscal year), the Endowment Fund had a balance of \$680,497, which is an increase of \$120,071 over the previous year.

Overall, Atla had a solid year financially in fiscal year 2018. The budget was set at \$7,829,089, with a portion of revenue expected to be drawn from an internal research and development fund. Some major projects were delayed until the current fiscal year, so money allocated from this fund for 2018 (\$717,016) was not needed or used, and it was rolled into the 2019 budget instead. Real revenue for 2018 came in at \$7,261,205. Actual expenses stayed well within budget at \$7,252,977.

The 2019 budget is set at \$7,966,779. Three quarters of the way through the fiscal year, Atla is on track with both revenue and expense.

It is instructive to see a high-level overview of where Atla's revenue came from in 2018 to set the context for the draft 2020 budget. By far, most of Atla's funds are generated through revenue derived from royalties as the result of library subscriptions to Atla research tools

(92%). Additional sources of revenue include dues and member programs such as the conference (3%), and other miscellaneous income such as income from investments (4%).

Atla uses the revenue it receives to support the work needed to achieve its mission and organizational ends. In 2018, some money was used for ongoing maintenance and expansion of the research tools (63%) and to provide administrative services to support the organization (13%). Four percent (4%) went to support the board and its committees, and 20% was used to support member programs and services.

In 2020, Atla has a number of major initiatives planned. These include the creation of a new strategic plan for the next 3–5 years, assessment of physical space in anticipation of our lease expiration in 2021, continued expansion of the Atla Digital Library and Atla Open Press publications, and continued expansion of Atla research tools.

The revenue and expense for the draft 2020 budget are both projected to be roughly \$8.2 million (see chart below). Atla is careful not to overestimate revenue, so the budget is not finalized until August, closer to the start of the fiscal year. Our primary source of revenue continues to be royalties from the research tools we create, with other revenue coming from member dues, the Atla Annual conference, other Member Programs services, and interest from investments. The line for R&D—research and development—is not new income but is from a fund that is maintained of any excess revenues from past years. That money is earmarked for projects that help assess the potential of new products and services and to conduct market research.

## **DRAFT 2020 BUDGET**

<b>Revenue:</b>	<b>\$ 8,271,356</b>
• Products	\$ 7,121,328
• Member Dues	\$ 147,500
• Atla Annual	\$ 84,500
• Other Member Programs Services	\$ 41,450
• Interest/Miscellaneous	\$ 101,578
• R&D Fund	\$ 775,000

The chart below shows projected expenses. The largest business expense comes from the salaries and benefits of roughly 43 staff. Significant funds also are spent on product related expenses, such as

support for the production platform. Atla's current lease has a built-in increase each year and includes state taxes and other fees. The cost for the office space is now projected to be \$662,144 next year. Staff travel includes visits to member libraries, exhibiting at conferences, and attending conferences related to the industry. A significant amount is spent on programs and activities for members—committee support, the Atla Open Press, webinars, and other various programs. Information technology is a significant expense; much of it is being moved into the cloud and telecommunications expenses continue as well. Other expenses include governance, which is counted as board expense, and our annual conference. Some marketing activities, staff development, and other contractor services for our audit, banking, and legal needs account for the remainder.

### **DRAFT FY20 BUDGET**

<b>Expense:</b>	<b>\$8,271,356</b>
• Salaries & Benefits	\$4,187,533
• Product Business Expense	\$1,448,087
• Rent, Leasehold Improvements, Electricity	\$ 662,144
• Staff Travel	\$ 415,971
• Programs for Members	\$ 360,108
• Office and General Expenses	\$ 271,969
• Information Technology	\$ 242,083
• Depreciation	\$ 197,846
• Telecommunications	\$ 112,400
• Board Expense	\$ 85,448
• Conference	\$ 85,000
• Marketing	\$ 81,990
• Staff Professional Development	\$ 46,777
• Audit, Banking, Legal	\$ 74,000

As always, Atla's accomplishments are the result of the collective efforts of many people. Without volunteer contributions on committees, interest groups, and task forces, along with the work of staff, Atla would not be able to accomplish its goal of promoting worldwide, scholarly communication in religion and theology by advancing the work of library and related information providers.

This has been a high-level overview of Atla's activities and

accomplishments during the past year that were focused externally on serving members and customers. But there were several major projects not mentioned yet that upgraded Atla's infrastructure and laid the groundwork for future growth and improvements in serving Atla's membership. Over the past two years, Gillian Harrison Cain, Atla's Director of Member Programs, was the lead coordinator on several major projects related to Atla's infrastructure. She and her team, along with many others from across Atla's Departments— Information Systems, Business Development, Financial Services, and Production—took on multiple projects that were critical to Atla's future success in better serving our members and business partners. All of these projects came to fruition during the past year and have been successful.

In the Summer of 2018, Atla launched a new Association Membership System (AMS) which includes a new member web portal. After issuing an RFP and reviewing the proposals, Atla selected to license and implement Nimble AMS™ from Community Brands®. Nimble AMS is built on Salesforce® and customized specifically for use by associations and nonprofits.

As Atla staff embarked on the search for a new AMS, our project goals focused on internal efficiency and increased capacity. Staff wanted to consolidate activities on the membership side of the organization to a single system from the multiple spreadsheets, systems, and memories that were actively in use. On the product side of the organization, staff sought to streamline publisher and partner communications and processes. Atla staff wanted a system that would more easily represent, manage, and track the intricate affiliations between people, libraries, institutions, consortia, publications, publishers, and others. Tighter integration with financial systems, better data tracking and reporting, and cloud-based solutions were also among the goals. The most visible component of the AMS to members and others other than Atla staff is the new web portal, which needed to utilize current authentication technologies and practices, appear more modern, and be more user friendly.

The new member web portal (<https://my.atla.com>) was designed to use current authentication standards including the self-service capability for members to reset their passwords. In this new portal, prospective members are able to submit membership applications and existing members are able to renew and manage both their individual and institutional memberships (if they are the member

representative) from a single login.

The portal has been designed to be one stop for everything related to Atla members. In addition to managing their membership and contact information, members can view activities such as event registrations, access members-only content (which was previously the Community tab in the website), see information about upcoming events and register, submit proposals for Atla Annual conference programs, apply for travel grants and the member loyalty program, and access member directories.

Both members and non-members are also easily able to make an Atla Endowment Fund gift or donate to the Scholarships and Grants Annual fund through the web portal. Gifts and donations may be anonymous or associated with an identified individual and made during the membership renewal process as well as throughout the year.

In the Spring of 2019, Atla launched a new website utilizing a new Content Management System (CMS). Again, after an RFP process, Atla selected to work with the organization Forum One, who also was working with the Board of Directors on branding, to implement the new brand in a new website utilizing the WordPress platform as the CMS.

The new website was designed to look modern and approachable and be intuitive to use. Increased use of white space and more visual elements, including photography and graphics, are key in the design. Photographs are of and by members, stock photography is deliberately not used, in order to support the strong sense of community and connection reflected in Atla's core values.

Single sign-on (SSO) authentication allows members to have a single username and password to access both the website and the web portal. Various navigational elements such as "Related Notes" and menus allow website users to easily move between areas of the site to find the information they seek.

In FY20, Atla plans to launch a new member community solution that integrates closely with both the new AMS and website and allows for greater member engagement and connection. The new web community will be designed to allow for members to engage in conversations and connect with colleagues. Functionality for Interest, Denominational, and Regional groups to communicate, collaborate, and share information with each other will be included. The new community will also serve as a place for members to access resources such as best practices, sample documents, professional development materials, and more.