The Information Architecture Institute

Annual Report 2004-05

This, our third eventful year, was marked by significantly increased visibility in the community and a more focused range of initiatives and services. Between 1 September 2004 and 31 August 2005 our membership grew 51%; as of 31 August 2005, the Institute had 845 members from over 55 countries. Our cash flow is positive, our volunteer rate is up, and our administrative activities have been streamlined. And clearly, the economic recovery experienced over the past year is having a positive effect on our industry.

Changing our name

On 1 March 2005 we officially changed our name from "The Asilomar Institute for Information Architecture" to "The Information Architecture Institute." The new name was chosen to better reflect our professional focus. With it, came a new visual identity, designed by James Spahr of New York.

Member feedback gathered through a membership survey indicated that the name "Asilomar Institute for Information Architecture" prompted more questions about Asilomar than about IA. In typical IA fashion, we weren't satisfied with a label that confused people unfamiliar with the Institute's history. The location of the founders' first meeting, Asilomar, has an important place in our history. Hence, we have named our Asilomar Sponsorship Program after Asilomar to reflect this proud heritage.

With the simplification of our name came a simplification of our message, too. In close cooperation with our Advisory Board, we redefined our focus – to advance the practice of information architecture through services, education, and advocacy. This clarification has also created a more polished lens through which we can examine the Institute's many initiatives.

Research grants

In December 2004, the Institute announced that two IA Progress Grants had been awarded. Each of these USD 1,000 grants was dedicated to advancing the practice of information architecture. Half of the grant money was awarded at the start of a project and the other half upon its completion/publication.

The first grant was awarded to Matthew Milan, a Masters' student at Ryerson University in Toronto, Ontario, who adapted methods from urban planning for use in information environments. The second grant was awarded to Step Two Designs Pty Ltd, an Australian consultancy that developed a set of intranet heuristics. Results from both projects have been published on the Institute's website.

Events

Throughout the year, the Institute sponsored or co-sponsored almost a dozen international events including the IA Summit in Montreal, Canada, Metadata for Interoperability in Shanghai, China, IA Tagung in Frankfurt, Germany, Online Information in London, UK, Effective Search in Sydney, Australia, and Enterprise Search in New York City, USA. Many of these sponsorships also enabled the Institute to provide substantial registration discounts to members.

In addition, 2004 saw the Institute sponsor the Future of IA retreat, organized by Christina Wodtke. Held at the Asilomar Conference Center near Monterey, CA on 1-3 October 2004, the Retreat was an incredibly successful microconference where 45 participants from four countries gathered to discuss advanced concepts from outsourcing to how rich interfaces require new methods.

The Institute also held a 1 1/2-day pre-conference at the IA Summit in Montreal on 3-4 March 2005. "The Leadership Seminar" was organized by Sarah Rice and Victor Lombardi. Eight internationally recognized practitioners shared their views on enterprise IA, security, the Semantic Web, business strategy, IA and globalization, and scenario planning. More than 95% of the attendees rated the IA Institute pre-conference as "very good" or "excellent" overall, and cited the relevance, subject matter expertise, and detailed materials.

Although previous pre-conferences have sold out, attendance in Montreal was somewhat disappointing. There are several possible reasons for this. First, there were significantly more pre-conferences than in previous years. Second, the Thursday pre-conferences had lower attendance than those on Friday. Third, we suspect that people are, in general, unwilling to commit to anything longer than a single day at this particular event. As a result, the Institute created a single day pre-conference at the Vancouver Summit, and scheduled for Friday.

During the summer of 2005 the Institute committed to sponsorship of an East Coast Retreat in New York State, and the EuroIA Summit in Brussels, Belgium. Both events took place in October 2005, and will be reviewed in the 2006 Annual Report.

Initiatives and services

At the start of the fiscal year the new Board reviewed the status of 17 established initiatives, 7 operational areas, and 9 other initiative suggestions that had not yet been adopted. A list of these initiatives can be found at http://iainstitute.org/pg/aifia_goals_2004.pdf.

Following this review, several initiatives were identified as "dead" either because the volunteers had never developed the program, the program had been found to be impractical, or volunteers had abandoned the project. These initiatives were moved to the Institute's idea bank until suitable volunteers could be found to develop these programs. Although the Board did not question the value of any of these ideas, precious time was being spent bemoaning their dormant status to the detriment of other, active projects.

The two greatest successes during 2004-05 were unquestionably automating the IA Job Board and opening the Mentoring Initiative.

The Job Board, in the skilled hands of Samantha Bailey, Austin Govella, Crystal Kubitsky, and Noreen Whysel, effectively connects employers and job-seekers through online job postings. Its new, automated interface has reduced the administrative burden and allows job postings to appear significantly faster. The Job Board originally launched in 2003 as a non-automated newsletter sent to members approximately twice a month. We are now averaging approximately 15 new postings each week. By automating it in 2004 we were able to make postings available via the website, often within 24-48 hours, and achieved a major reduction in busy-work. The

newsletter continues to be mailed out bi-weekly. We are also able to send the list of postings to anyone who requests to be on the mailing list, regardless of whether or not they are a member, because the position descriptions themselves are behind the login on the website. That makes the Job Board both a valuable tool for our members and also a marketing tool that helps non-members get a sense of one of the benefits of membership. Austin Govella created the initial infrastructure for the system and Samantha Bailey wrote the newsletter. Crystal Kubitsky played a major role in the interaction design of the automated Job Board. Noreen Whysel provided editorial feedback and QA assistance and is now in charge of newsletter administration.

The Mentoring initiative, as proposed and developed by Jeff Lash and Donna Maurer in early 2004, was significantly streamlined by Jeff during 2005. This initiative helps improve the skills of current and future information architects by providing them with the opportunity to be mentored by an experienced information architect. In August 2005, a Mentoring Survey was sent to the IAI membership so their feedback could be used to improve and expand the program. During the coming year, Jeff Lash will step back as head of the program and its administration will be handled by Noreen Whysel, the Institute's newly hired Operations Manager. This serves as a useful model for how ideas become initiatives, mature, and grow to become full-fledged member services.

Our Annual Salary Survey was conducted in the summer of 2005 by Eric Reiss and reviewed by Rashmi Sinha. XLS files of the results can be downloaded from the Institute's website.

The Translations initiative continues to flourish, particularly in Germany where Wolf Nöding and a substantial local team continue to improve the Institute's offerings.

The IA Tools and Library initiatives have also reached a stage of maturity by which they may rightly be called "member services", although keeping these resources up-to-date remains somewhat problematic.

The IAI Members' Mailing List is a lively forum in which members can exchange ideas in a professional environment. For example, during the summer of 2004, the term "folksonomy" was coined on the IA Institute member mailing list. A label to describe the phenomenon of social classification on websites like Flickr and del.icio.us, folksonomy rapidly escaped the IA community into the larger conversation about next-generation web applications. Our thanks to the IAI members who participated in the thread that generated this meme – Gene Smith, for starting the thread and blogging the results, Eric Scheid for reminding us that librarians have been studying "folk categories" for years, and Thomas Vander Wal for actually coining the word. A year after this initial discussion, there were 508,000 instances of "folksonomy" in Google – a concept that has highlighted IA issues for thousands of designers, developers, and business people. The Institute is proud to have been part of this process.

Educational initiatives, such as the IA Bootcamp, are still in their infancy, despite considerable effort on the part of the Board to develop these. However, a tentative Bootcamp curriculum has been created and a formalized program is expected to develop during the coming year.

Publication of the Institute's monthly Newsletter was erratic in 2004-05. Producing this important communications vehicle on a regular basis therefore became one of the responsibilities of the new Operations Manager.

The Institute's own website has grown organically over the past few years. As a result, it is difficult to navigate and suffers from other basic usability problems, plus a myriad of backend hurdles. Samantha Bailey and Eric Reiss recruited volunteers during the summer of 2005 who have been given the authority to revamp the site. This is scheduled to take place during the first half of 2006 and will be reviewed in the 2006 Annual Report.

Infrastructure

Much of the legacy membership infrastructure used by the Institute today was put together quickly in order to get things up and running. As the membership has grown, we have faced challenges with the scalability, administration, and maintenance of these systems. Many thanks to all who have contributed to the ongoing development and maintenance, particularly Austin Govella, Shane Winegard , and Gene Smith. We cannot thank them enough.

We are looking at alternative on-line payment systems that will make it easier for potential members from outside North America to pay their membership fees.

Improving our infrastructure was an ongoing concern throughout 2004-05, and will remain a key priority during the coming year.

Staff

Board elections were held in August 2004 to replace outgoing members, Lou Rosenfeld and Peter Morville. Jess McMullin and Eric Reiss were elected, which was officially announced on 16 September.

The new Board elected Victor Lombardi as president, Jess McMullin as secretary, and Livia Labate as treasurer. Due to Livia's pending move from Brazil to the U.S., Lou Rosenfeld agreed to function as treasurer until Livia got settled in her new city. We'd like to thank Lou for his tremendous help with numerous treasury issues throughout the long period of transition.

In addition to drawing on our outstanding volunteer staff, Board of Directors, and Advisory Board, the Institute also contracted with Perry Hewitt of Cambridge, MA for PR and consulting services throughout the year. In addition to creating numerous press releases, Perry developed the Institute Member Snapshots that appear at the bottom of the Institute's home page.

As her own business grew, Perry's direct involvement with the Institute decreased; we enjoyed significantly discounted rates. As of 31 August 2005, Perry was no longer active within the Institute, but remains one of our true friends. We look forward to benefiting from Perry's enthusiasm and skilful consul when she returns from her Australian sabbatical in mid-2006.

During July and August of 2005, Jess McMullin and Eric Reiss were tasked with finding a part-time Operations Manager for the Institute. Since both Jess and Eric would be continuing on the Board during 2005-06, their choice seemed natural for the outgoing Board members.

Several highly qualified individuals applied for this position. After a final interview, Noreen Whysel of New York City was chosen to be our Operations Manager. She assumed her new position in September 2006, when the new Board was constituted.

In August 2005, annual elections were held for the three Board positions vacated by Victor Lombardi (President), Livia Labate (Treasurer), and Samantha Bailey. Newly elected members include Samantha Starmer, Stacy Surla, and Peter Merholz. We warmly welcome these three new directors and their creativity, energy, and vision.

Finances

The Institute continues to maintain a strong financial position. As of 31 August 2005 the Institute was firmly in the black, with cash assets of USD 47,591. During the past fiscal year our financial position continued to improve, thanks to new and renewed memberships totalling USD 27,269 in income, and USD 4,927 from the pre-conference seminar at the 2005 IA Summit. There was also cash-on-hand from the previous fiscal year.

The Institute's primary expenses included USD 5,626 for professional fees, including legal, accounting, bookkeeping, and marketing. Moreover, the Institute also spent USD 5,156 for our pre-conference seminar, production costs and promotion, USD 2,100 for conference call fees, USD 1,000 on the Grants Program, and USD 2,100 for events sponsorship. Although the Institute sponsored a significant number of events, payment for some of these will appear in the 2006 Financial Reports.

Please note, that although the elected year for the Board of Directors runs from 1 September until 31 August, our fiscal year follows the calendar year. Thus, to coordinate our Annual Report and our fiscal year, our next Annual report will cover a 15-month period from 1 September 2005 until 31 December 2006. Subsequent reports will follow the calendar year.

A detailed Profit & Loss statement and Balance Sheet are attached in Appendix 1 of this report.

Thank You

Many individuals have helped the Institute this year, and this Report cannot adequately recognize all those who contributed to our success. Volunteers built the Institute into what it is today, and we wish to thank everyone who has contributed to our ongoing success.

Sincerely,

The IAI 2005-06 Board of Directors
March 14, 2006

Peter Merholz, President
Samantha Starmer, Secretary
Stacy Surla, Treasurer
Jess McMullin
Eric Reiss

Appendix 1
Financial Reports

Balance Sheet

Cash Basis

As of August 31, 2005

	Aug 31, 05
ASSETS	
Current Assets	
Checking/Savings	
Comerica	36,991.12
PayPal	3,345.19
Wachovia Non-Profit Checking	7,254.81
Total Checking/Savings	47,591.12
Total Current Assets	47,591.12
TOTAL ASSETS	**47,591.12**
LIABILITIES & EQUITY	
Equity	
Retained Earnings	38,646.74
Net Income	8,944.38
Total Equity	47,591.12
TOTAL LIABILITIES & EQUITY	**47,591.12**

Profit & Loss

Cash Basis

September 2004 through August 2005

		Sep '04 - Aug 05
Ordinary Income/Expense		
Income		
Leadership Seminar IA '05		4,926.64
Membership Dues		27,269.32
Total Income		32,195.96
Expense		
Annual Board Meeting Exps.		639.96
Bank Service Charges		
Bounced Check Fee	105.00	
Deposit Item Returned - Fee	60.00	
Total Bank Service Charges		165.00
Conference Call Service		2,100.00
Credit Card Merchant Fees		
Pay Pal Fees	841.89	
World Pay Fees	899.00	
Total Credit Card Merchant Fees		1,740.89
Event Sponsorship		
2004 Dublin Core Event	500.00	
IA Summit	1,000.00	
IAI Retreat	600.00	
Total Event Sponsorship		2,100.00
Grant Program		1,000.00
Licenses and Permits		20.00
Office Supplies		21.00
Printing and Reproduction		
Institute flyer	75.00	
Total Printing and Reproduction		75.00
Professional Fees		
Bookkeeping	685.80	
Legal Services	969.85	
Logo/Graphic Designer	1,800.00	
Marketing Consulting Fees	2,170.00	
Total Professional Fees		5,625.65
Program & Seminar Expense		
Leadership Seminar Catering	239.17	
Leadership Seminar Speaker Exp.	4,916.53	
Total Program & Seminar Expense		5,155.70
Web Operations		500.00
Total Expense		19,143.20
Net Ordinary Income		13,052.76
Net Income		**13,052.76**