

**Washington Affairs Office Review Special Committee (WAORSC)  
Final Report  
March 6, 2009  
Submitted by Sarah Holterhoff, Chair**

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**I. Introduction**

This report contains (1) a summary of the recommendations in the WAORSC Interim Report (Sept. 12, 2008), which were approved by the Executive Board at the Fall 2008 Board meeting, and the subsequent implementation of those recommendations; (2) information about matters in the Committee's charge that have been addressed since the Interim Report was written; and (3) a review of other activities and accomplishments of the Committee since its inception in Spring 2008 (some of which were reported previously in the Interim Report but which are included here to provide a complete record).

**II. WAOR Special Committee and its Charge**

The Committee, appointed by President Ann Fessenden in February 2008, was charged to consider the future of the AALL Washington Affairs Office (WAO) and related matters.

Members of the committee:

Timothy Coggins (University of Richmond Law Library)  
Mary Lou Hess (Wolf, Block, Schorr and Solis-Cohen, LLP, Philadelphia, PA)  
Keith Ann Stiverson (Chicago-Kent College of Law Library)  
Maryruth Storer (Orange County Public Law Library, Santa Ana, CA)  
Kay Todd (Paul Hastings Janofsky & Walker LLP, Atlanta, GA)  
Gail Warren (Virginia State Law Library)  
Sarah Holterhoff (Valparaiso University Law Library), Chair

Board Liaison: Ann Fessenden, AALL Immediate Past President.

Staff Liaison: Kate Hagan, AALL Executive Director.

The Committee was given a two-fold assignment: (1) to assess the evolution and current role of the Washington Affairs Office as the center of the Association's government relations activities and (2) to make recommendations for the future direction and continuity of those efforts.

Specifically, the Committee was charged to:

1. Review the purpose of the WAO
2. Review the operation of the WAO
3. Review the relationship of the WAO with other AALL entities
4. Consider and make recommendations to the Executive Board on the following matters, as well as any other matters that it deems relevant:
  - How the Washington Affairs Office should be staffed and managed in the future.
  - Whether it is a desirable or viable option to appoint another Washington Affairs Representative who is a practicing law librarian and who is compensated only by an honorarium.
  - If another Washington Affairs Representative is to be appointed, what qualifications should be required, what should be the terms and conditions of employment, and how should the representative be selected.
  - What type of support is needed by the WAO staff in interpreting and applying the AALL Government Relations Policy, and how that support can be provided expeditiously so that AALL can respond to rapidly-changing political situations.
  - Identify/clarify role of the Washington Affairs Office in advocacy, intellectual property, and access to and dissemination of government information.
  - How AALL can prepare for orderly succession planning for WAO staff.
  - Whether the Washington Affairs Office should continue to be located at the Georgetown University Law Center (assuming that option is possible).
  - If the WAO does not remain at Georgetown, what other options for its location are desirable and feasible.

### **III. Implementation of Recommendations in WAORSC Interim Report**

Although the Committee had been charged to submit a final report with recommendations for the Fall 2008 Executive Board meeting, it became clear when the Committee met in Chicago in August that more time would be needed to complete all aspects of the Committee's charge and to address some additional issues. Instead, the Committee submitted an Interim Report for the Board's consideration at its Fall 2008 meeting, which explained the Committee's work to date and presented detailed analysis of its recommendations for (1) a restructured Office headed by a staff Director rather than a member Representative; (2) a change in the name of the Office; and (3) an extension of the Committee's term and change in the deadline for its final report.

The Board voted on Oct. 25, 2008 to approve three motions based on the WAORSC recommendations. These were:

(1) That the AALL Executive Board establish the staff position of Director of the Washington Affairs Office, with the person in the position reporting to the AALL Executive Director. That the Washington Affairs Representative position be officially discontinued when the Director position has been filled.

(2) That the AALL Executive Board change the name “AALL Washington Affairs Office” (WAO) to “AALL Government Relations Office” (GRO), with the change to be announced and to take effect as soon as feasible. That the title of “Director” in Recommendation 1 (if approved) become “Director of the AALL Government Relations Office.”

3) That the Board extend the term of the WAOR Special Committee to April 30, 2009 and amend the charge of the Committee to state that its Final Report be submitted for the Spring 2009 Board meeting.

[Note: The supporting analysis, as well as a detailed description of the background investigation and member input that the Special Committee used to arrive at its recommendations, appears in the Committee’s Interim Report, which can be obtained from the AALL Executive Director.]

Shortly after the Board action, AALL Executive Director Kate Hagan offered the new position of Director of the Government Relations Office to Mary Alice Baish, who accepted the offer.

The changes concerning the name and leadership of the Office that the Board had approved were announced to the AALL membership by President James Duggan in the November E-Newsletter on AALLNET as follows:

“Also at the fall meeting, the Executive Board approved a name change for the AALL Washington Affairs Office; it is now the AALL Government Relations Office. The name change is a result of member research, which indicated that the new name will more accurately reflect the broad scope of the office, which includes advocacy efforts at national, state, and local levels. The name change will require a transition process as we work to update AALLNET and related material. This process will take place over the next several months.

Last, but certainly not least, Mary Alice Baish was named director of the Government Relations Office. Mary Alice will serve as the chief staff person for AALL’s advocacy efforts, promoting AALL’s information policy agenda.”

During Nov. and Dec. 2008, AALL staff members began the process of changing the name “Washington Affairs Office” to “Government Relations Office” in appropriate locations on the web site and in print publications, while taking care to retain appropriate information about the previous identity of the Office.

#### **IV. Completion of Committee’s Charge**

- 1. Effect on AALL’s tax-exempt status of current and future expenditures related to lobbying** During the Committee’s work, a new issue arose—the need to reexamine the

effect of AALL's advocacy efforts on the Association's tax-exempt status under section 501(c)(3) of the Internal Revenue Code (26 U.S.C. § 501). There are restrictions placed on non-profit organizations with 501(c)(3) status regarding how much legislative (lobbying) activity they may conduct. The definition of lobbying has recently been applied more broadly by the IRS. The Executive Director alerted the Committee to this concern. The AALL attorney has advised that the Association carefully monitor AALL's lobbying activity, both staff and volunteer, and the percent of time spent by the two GRO staff members on activities that are covered by the broader interpretation of lobbying. If AALL expenditures on activities considered to be lobbying reach a certain threshold or "lobbying ceiling amount," it could be necessary for AALL to form a separate section 501(c)(6) organization for the Government Relations Office.

## **2. Location of the Office**

The Committee's research into the government affairs activities of other major library associations confirmed that maintaining an office in the Washington, D.C. metropolitan area is the accepted practice. For nearly twenty years, AALL's advocacy efforts have been housed conveniently and comfortably at Georgetown University Law Center. Continuing to have an AALL presence in Washington is crucial for AALL. However, recently there have been clear indications that the situation at Georgetown is changing. The space now occupied by the Office soon may be reclaimed by the University for another purpose. Looking to the future, the Committee identified several general criteria for an appropriate space/location for a relocated Office. These are: (1) address (proximity to the Capitol and prestige/cachet); (2) nature of the landlord's business (renting office space in the building of a large law firm might be a possibility, but a not-for-profit with similar interests/issues would be preferable); (3) size and shape of the space; and (4) rental cost. Currently, the Office has approximately 450 square feet of available space, but also has use of common areas in the building (such as the entryway and restrooms). Allowing for additional space for such amenities and for possible additions to the Office staff in the future, 1000 square feet seems to be a realistic estimate of the space needed if the Office is relocated. In addition, the Association must also consider the infrastructure needs (computer/technology support, phone service, parking, etc.), which have been part of the "package" at Georgetown. It seems clear, therefore, that AALL will likely be spending more to get less if the Office is no longer housed at Georgetown. If it becomes necessary to identify a new location and plan a move, the necessary investigation and arrangements will be made by the AALL Executive Director and the GRO Director, subject to the approval of the AALL Executive Board.

## **3. Personnel to staff the Office in the future**

The GRO Director and the AALL Executive Director have analyzed the current staffing needs and have concluded that the current staff is sufficient at this time. AALL Headquarters staff in Chicago can be a source of additional assistance to the GRO staff in Washington on some tasks. The WAORSC believes that it is important to note that the current staffing level (a director and one assistant) provides fewer total work hours than the Office has had in the recent past, prior to the discontinuation of the member Washington Affairs Representative

position. Thus, it is possible that more staffing hours for the GRO may be necessary in the future.

#### **4. Member involvement/input**

The Committee discussed the idea of an AALL Policy Advisory Council to advise the GRO, but concluded that creating such a group is not necessary at this time. The GRO Director is Staff Liaison to three of AALL's policy committees (Government Relations, Copyright, and Electronic Legal Information Access and Citation). She works closely with the chairs and members of these committees throughout the year and receives considerable advice and input from them. The GRO Director attends meetings of the AALL Executive Board and provides the Board with updates on the activities of the GRO. AALL information policy in new areas may be developed through actions taken by the Executive Board. Member involvement and input into AALL's government relations program also occurs through the chapters (many of which have their own government relations committees), through GRC contacts in each state, and from individual members who attend advocacy training, participate in the Advocacy Discussion Forum (aall-advoc), or subscribe to the AALL Washington Blawg via RSS feed or email. If, however, the GRO Director indicates in the future that there is a need for a small group of members who are active in the government relations program to offer advice and consultation as needed, the GRO Director should notify the Executive Director and the President of the Association.

#### **5. Suggestions for increased, enhanced communication**

After hearing comments from Association members, especially newer members, the WAORSC members decided to create an annotated list of acronyms encountered in government relations reports and activities, as well as definitions of key terms and phrases. The Committee, working with the GRO Director, considered whether such a need was already being addressed by the "Links" document found on the current GRO web page and by the Google search function on AALLNET. Committee members concluded that while a definitions page is not necessary, they would like to see a GRO Acronyms list to be created and to be updated on a regular basis, possibly making the annual updating a responsibility of the AALL Government Relations Committee. An initial "Frequently Used Acronyms and Abbreviations" list is being developed by Tim Coggins and Mary Alice Baish, and the completed list will be posted on the GRO page of AALLNET, to be updated annually by the GRC.

#### **6. Clarification on GRO web page**

The front page of the GRO web page on AALLNET was changed in November to include the following language: "Staff work on information policy issues in accordance with AALL's Government Relations Policy and in consultation with the Copyright Committee, Electronic Legal Information Access and Citation Committee, Government Relations Committee, and, where necessary or appropriate, the President or Executive Board of the Association." This language (previously located in a less-prominent location on the web page) is now highlighted on the front page, clarifying the relationship that the GRO has with the

Association's three relevant policy committees and emphasizing that the GRO bases its statements and activities on existing AALL policy. The change was inspired by comments from a WAORSC member concerning possible member confusion about this relationship.

## **7. Composition and Appointment of Copyright Committee and GRC**

The Committee heard comments about the appointment and composition of two of AALL's policy committees—Copyright and Government Relations. Chairs of these committees in recent years have expressed concern that certain of their new members lack the necessary expertise and knowledge to participate fully in the discussions and are not well-equipped to assist with the development of policies, white papers and other necessary documents. As the Committee discovered in its review of the history of the WAO, earlier reports on AALL's government relations/advocacy activities strongly emphasized the substantial subject matter knowledge that should be required for membership on the Copyright Committee and the GRC.

While the WAORSC acknowledges the value of creating a balance of experienced and less-experienced members and representation from various library types for most committees, it believes that it is very important that members appointed to the Copyright Committee and the GRC bring specialized knowledge about the respective policy issues of the committees, in addition to a desire to serve. The charge for the Copyright Committee currently includes a membership qualification of "expertise in copyright law," but the charge for the Government Relations Committee includes only the somewhat antiquated requirement that "members must have the resources to monitor federal legislation."

The WAORSC encourages the Board to update the member qualifications for the Government Relations Committee and to emphasize to those responsible for appointing committee members (the incoming President and Vice-President and the Appointments Committee) that background knowledge of the respective policy issues and concerns of these committees should be a prerequisite for appointment. The WAORSC also recommends that the Committee Volunteer form should highlight that some committees have special requirements.

## **8. Charges of the Copyright Committee and the Government Relations Committee**

Although the new charges for these two committees took effect in 2008-2009 (resulting from the work of the Special Committee on Committee Structure), additional revision is needed to more accurately describe the current relationship between the committees and the Government Relations Office and current processes for development of testimony, position statements, etc. The WAORSC also recommends the addition of consistent language reflecting the responsibility of each committee to keep the Director of the Government Relations Office and the AALL President informed of its efforts.

## **9. Staff Succession Planning**

The Committee was asked to consider how AALL can prepare for orderly succession planning for WAO (now GRO) staff. Since the Executive Board approved the WAORSC recommendation (made in its Interim Report) to create a staff position of Director of the GRO, the Committee believes that no further answer to this question is necessary. Staff succession for the GRO will now be handled in the same manner as other AALL staff appointments. In the future, when it becomes necessary to fill an upcoming vacancy in the position of GRO Director, the WAORSC encourages the AALL Executive Director to involve members in the selection process. The WAORSC understands that the Executive Director has sought member involvement when she has filled other director positions on the AALL staff and believes that a similar process should be used in the hiring of a new GRO Director. If possible, when the position needs to be filled, the WAORSC hopes the AALL Executive Director will involve the chairs of the Copyright Committee, the Government Relations Committee, and the Electronic Legal Information Access and Citation Committee in the review of candidates for the position. The GRO Director serves as staff liaison to all three committees, so their chairs should add a useful perspective to the selection process. In the immediate future, it will be beneficial for the current GRO staff to document their activities, procedures and contact lists. This is part of an effort initiated by the AALL Executive Director to have all AALL staff members develop procedure manuals for their positions.

#### **V. Review of Other WAORSC Activities and Accomplishments (summarized from the Interim Report of the WAORSC and updated through February 2009).**

1. In the course of its work, the WAORSC created two documents that it believes will have lasting value for the Association and for which future updating should be assigned to some AALL entity. The most recent versions of both of these documents are appended to this Final Report.

*Highlights of the History of the AALL Government Relations Office (formerly the Washington Affairs Office)* is a chronology of the Office, which WAORSC members created after much research to identify and review reports about the establishment of the WAO and subsequent developments. This document sheds considerable light on the original intent of the AALL advocacy efforts in Washington, D.C. It also shows how that purpose has been successfully carried forward and achieved through the years. The Committee recommends that this history be posted on the GRO web page on AALLNET, perhaps under an “About” heading.

*Frequently Asked Questions about the AALL Government Relations Office (GRO) in Washington, D.C.* This compilation of questions and answers was begun early in the Committee’s term and was created for several reasons. The primary one was a perceived need for a source of information for AALL members who might have varying degrees of knowledge about the Office. Committee members also wanted to develop a clear understanding for themselves regarding the work of the Office, as background for making recommendations about its future. By the time of the 2008 AALL Annual Meeting, the Committee had produced a draft version of the FAQ compilation and decided it would be

beneficial to distribute copies of that draft to attendees at the three focus groups held by the Committee. Feedback from attendees was positive. Further revisions of the document have been made, following the Board's action on the WAORSC Interim Report recommendations, in order to reflect changes in the name and structure of the Office. The Committee suggests that a final version of this document be posted on the GRO web page on AALLNET and that various ways be found to distribute it to AALL members and others.

2. In the early months of the Committee's work, several activities were carried out in an effort to obtain the opinions, views and comments of AALL members concerning the WAO. The Committee employed a three-pronged approach to gather AALL member input, comprised of (a) an online survey of stakeholders, (b) a blog for general membership input, and (c) focus group sessions with a cross-section of AALL members, including one focus group specifically aimed at newer law librarians.
  - (a) The online survey was distributed to 46 individuals, including current and then-incoming Board members and past and current chairs of AALL policy committees; 22 of those individuals responded to the survey. The survey results indicate that the stakeholders are very satisfied with the Washington Affairs Office and that the WAO is viewed as a member benefit along with *AALL Spectrum* and *Law Library Journal*. One individual comment summarizes the expressed opinions of a majority of the respondents: "I think the profession would lose a significant part of its identity without this advocacy."
  - (b) The blog, "Beyond the Beltway," was designed to collect the observations and experiences of AALL members regarding the Association's government advocacy efforts, as well as their comments on what the work of the WAO has meant to them. The blog was active for ten business days, June 19 – July 2. Eleven questions and issues were posted, a new one each day. Three members of the Committee were responsible for monitoring the blog on specific days. AALL members posted responses on all days that the blog was operational, with a total of thirty-four responses and seventeen individuals posting messages. Although the blog was developed as a way for the general membership of AALL to provide input, nearly all those who responded had participated in the Government Relations Committee or in either chapter or national advocacy activities. The posted comments dealt generally with individual advocacy actions.
  - (c) Three invitation-only focus group sessions were held during the AALL Annual Meeting in Portland, with two Committee members acting as facilitators. A total of thirty AALL members participated as focus group attendees. At two of the sessions, the attendees were a cross-section of active AALL members, selected from recommendations of SIS and chapter leaders. The third group consisted of younger/newer AALL members, most of whom were suggested by the GenX/GenY Caucus. All participants expressed significant interest in and support for the Washington Affairs Office. There was considerable discussion about whether the Washington Affairs Representative should be a practicing law librarian or a lobbyist, and the focus group with the newer members of the profession asked questions about

the name of the office. To them, the use of the word “Washington” implies that the office only deals with federal information policy issues, not state, international and other issues. There was a general lack of awareness about AALL government relations policies and how those policies are developed. The attendees suggested that there should be more targeted communication between the WAO and AALL members (e.g., subject line could target type of library; social networking tools might be used to target particular sub-groups of members) in order to keep them updated about AALL government relations issues which affect them in their specific type of library. The focus group attendees were given a draft copy of the *FAQ* document (see Appendix B at the end of this report for the latest version) which the Committee had developed, and were asked to provide feedback regarding the questions and answers. Attendees found the *FAQ* to be useful and suggested that it be posted on AALLNET.

3. The Committee also requested an assessment of the current WAO operations from the Acting Washington Affairs Representative. She worked closely with the WAO Communications Assistant and the AALL Executive Director to prepare such an assessment. The assessment provided sufficient background information about the WAO to give Committee members a better understanding of all the issues that the WAO currently monitors as well as a comprehensive list of all the groups, individuals, other associations, etc. with whom the WAO works and creates liaisons. The assessment also included budget information about the WAO operations and position descriptions for the Acting Washington Affairs Representative and the Communications Assistant. These position descriptions, written at the Committee’s request, identify the current duties of each staff member.
4. The government affairs activities of library and other professional associations were investigated by a Committee member and the results were shared with the rest of the Committee. In order to see how comparable associations handle government relations and advocacy, the Committee reviewed the government affairs activities of seven library associations and seventeen “other” professional associations, most identified as associations of a similar size, structure and budget as that of the AALL. With the exception of one, all library associations encourage member participation in and support of the association’s government affairs and advocacy efforts; of the seven library associations, the three largest associations (ALA, ARL and SLA) employ full-time staff dedicated to government relations and information policy, and each maintains an office in the Washington metropolitan area. The government affairs activities of the other associations range from maintaining full-time staff positions dedicated to public policy and government relations (9), contracting for the services of legal counsel or a professional lobbyist to handle government relations (2), creating a separate “Political Action Committee” funded by member donations (3), maintaining member committees focusing on government policy to no identifiable government relations activity (3). Nearly all of the associations that were examined encourage members to participate in advocacy efforts. Most of them provide legislative information, legislative alerts and advocacy training via their website. No other association examined has followed the AALL model of delegating primary responsibility for association government relations

and advocacy to a member volunteer compensated by an honorarium (Washington Affairs Representative).

## VI. Conclusion / Final Recommendations

The assignment given to the Washington Affairs Office Review Special Committee was two-fold: (1) to assess the evolution and current role of the Washington Affairs Office; and (2) to make recommendations for the future direction and continuity of those efforts. The recommendations contained in the WAORSC Interim Report, and the action of the Executive Board in approving them, resulted in restructuring and renaming of the Office. Based on information provided in this Final Report, the Committee concludes its work by making three final recommendations.

- That the AALL Executive Board confirm that special qualifications of background and prior knowledge are necessary for membership on the Copyright Committee and the Government Relations Committee, that the Appointments Committee be instructed accordingly, that the charge of the Government Relations Committee be revised to include this requirement, and that information about special requirements be highlighted on the Committee Volunteer form.
- That the current charges of the Copyright Committee and the Government Relations Committee be amended to more accurately reflect the current relationships between these committees and the Government Relations Office, and the current responsibilities of each in development and implementation of AALL information policy and communication with AALL leadership.
- That the following items created by the Washington Affairs Office Review Special Committee be posted on AALLNET and be updated on a regular basis by the appropriate staff or AALL committee: *Highlights of the History of the AALL Government Relations Office (formerly the Washington Affairs Office)*; *Frequently Asked Questions about the AALL Government Relations Office (GRO) in Washington, D.C.*; and the *Frequently Used Acronyms and Abbreviations* list.

## APPENDIX A—WAORSC Final Report

### Highlights of the History of the AALL Government Relations Office (formerly the Washington Affairs Office) [updated as of February 2009]

***Introduction:** Early in the history of the American Association of Law Libraries (founded in 1906), its members and leaders recognized a need for the Association to take a public role and to participate in legislative, judicial, and regulatory processes. But it wasn't until the late 1980s that AALL began to develop a formal government relations program and a presence in Washington, D.C. This document traces the steps by which AALL became involved in advocacy at the federal level by establishing a Washington Affairs Representative, which led to the Washington Affairs Office (now the Government Relations Office). Today the GRO also addresses information policy issues at the state and international levels. The following brief history traces the evolution of AALL's advocacy representation and office.*

**1988**—President Margaret Leary appoints a Special Committee on National Information Policy for a two-year term. Chair is Robert Oakley.

**1988**—“Does AALL Need a Lobbyist?” program is held at AALL Annual Meeting in Atlanta

**1989**—Special Committee on National Information Policy submits an Interim Report [83 Law Libr. J. 149 (1991) but not posted as a separate document yet on AALLNET] to the Executive Board.

This report contained ten recommendations which, when taken together, were designed to (a) increase the awareness of AALL members about the public policy issues that affect them as law librarians, (b) create an organizational structure by which AALL can effectively track and respond to such issues, and (c) create a presence for the Association in Washington, D.C. Most of the ten recommended actions were adopted in some form by the Board, including: “The identification of two people in the Washington area who would be able and willing to make a three- to five-year commitment on behalf of the Association to develop relations with the D.C. offices of other library organizations, with Congress and with other federal agencies and offices.” Before making their recommendations (for AALL to become much more active in national affairs) the Committee consulted with representatives of ALA, SLA, and MLA, as well as with a professional lobbyist. Everyone who was consulted felt that a “continuing Washington presence” was critical to the success of such an effort, for three main reasons:

- Important for an AALL representative to be part of the informal, but very real, network that exists in Washington.
- An AALL contact in Washington would soon be known by members of Congress and would be able to consult them and be consulted by them about concerns.
- A regular Washington representative for AALL could be called upon on short notice to attend a meeting or a hearing on which AALL had some interest.

“The Special Committee considered meeting this objective by establishing a Washington office similar to SLA and ALA, or through the hiring of a paid lobbyist to act on our behalf. In both

cases, the Special Committee concluded that the time was not right for such a step...a branch office (of AALL Headquarters) is a possibility, but the committee felt that it, like the idea of a paid lobbyist, is premature...Accordingly, the Special Committee does not rule out either possibility for the future, but it strongly believes that the first steps—much less expensive steps—are those indicated in this report.”

**1989**—In June the AALL Executive Board approved a restructuring of the existing Legislation and Legal Developments Committee into the Government Relations Committee and the appointment of Robert Oakley of Georgetown University Law Library and Joanne Zich of American University’s Washington College of Law as Washington representatives for the Association. Oakley was serving at the time as Chair of the Special Committee on National Information Policy. Zich had served as Chair of the Legislation and Legal Developments Committee in 1986-87. Both Oakley and Zich had prior experience preparing Congressional testimony and Oakley had testified at several hearings.

**1990**—On May 31, Special Committee on National Information Policy submits its Final Report [83 Law Libr. J. 177 (1991) but not posted yet as a separate document on AALLNET] to the Executive Board, which includes several further recommendations. Those actions approved by the Board on June 15 include adoption of the proposed Government Relations policy, amending the charge to the Washington representatives to clarify that they are spokespersons for the Association, and requesting a review by the Washington representatives of their work at the end of the first three years (so, in 1992). The report states that Joanne Zich and Charlotte White drafted the proposed Government Relations Policy. Both of them had previously chaired the AALL Legislation and Legal Developments Committee. The version of the policy which was approved by the Board is found at 83 Law Libr. J. 191 (1991). As the Special Committee report states, this policy is intended to “provide a guide to the Executive Director, the Washington representatives, members of the Executive Board, and anyone else who might be discussing AALL’s public policy concerns.” In regard to the Government Relations Committee, the report further states that “the scope of activity of the Committee is limited to that which is ‘consistent with’ the government relations policy.”

June 18, 1990—The first Annual Legislative Update is held at the AALL Annual Meeting in Minneapolis.

**1991**—In July Joanne Zich steps down from her position as one of AALL’s two Washington Affairs Representatives, having been elected Vice-President/President-Elect of the Law Librarians’ Society of Washington, D.C. Bob Oakley continues to serve as Washington Affairs Representative, which from that time forward becomes a one-person representation.

**1992**—In June, Bob Oakley submits a Report of the Washington Affairs Representative on AALL’s Government Relations Program and Recommendations for the Future [posted on AALLNET as pp. 69-114 of the WAO Background Reading: [www.aallnet.org/committee/waor/wao-background-reading.pdf](http://www.aallnet.org/committee/waor/wao-background-reading.pdf) ]. The report recommends hiring a full-time assistant to support the work of the current Representative.

Appendix A to that report is the Report of the Government Relations Committee on the Washington Affairs Representative. [Tim Coggins, Chair] [This appendix does not yet appear on AALLNET but Sally Holterhoff has a print copy of it.] That report considered various options for an AALL Representative in Washington:

- Practicing Librarian as Representative
- Lobbyist to represent the Association
- Other alternatives, including a student or other intern; a full-time Deputy Representative; move Headquarters to Washington; partnership between a hired lobbyist and a practicing law librarian; sharing a lobbyist with other organizations; “growing our own”; and continuing Bob Oakley’s term indefinitely.

**1993**—Susan Tulis, AALL member and law librarian at University of Virginia Law Library, takes a one-year leave in order to accept a temporary position in Washington, D.C. as AALL Assistant Washington Affairs Representative. She begins working in March. In October 1993, Bob Oakley and Susan Tulis submit to the Executive Board a Report on the Assistant Washington Affairs Representative position: Eight Months After. [Not posted on AALLNET yet but Sally Holterhoff has a print copy.] This joint report notes that in eight months time, AALL had been involved in ten major information policy issues and seven lesser ones, far more than could have been addressed by a volunteer member serving as Representative on a part-time basis while also working full-time as a law librarian.

“As a result of having not only the Washington Affairs Representative, but now an Assistant, AALL has gained increased presence, visibility, and a name for itself in Washington, DC. As issues come up we are frequently contacted for our advice and opinion. We have also earned the reputation of being an association that is willing to listen to the various sides of an issue before taking a stand.”

Oakley and Tulis recommended that the Assistant position be continued indefinitely and that it continue to be housed at the Georgetown University Law Library for the duration of the term of the current Representative, concluding that the existing arrangements seemed to effectively meet the need of AALL at that time. They listed several “unanswered questions,” stating that these questions should be answered [in the future] when the need arises.

- What happens in two years when Bob Oakley’s term as Washington Affairs Representative ends?
- Where will the assistant be located after that time?
- If AALL shared office space with another library association, it might make it difficult for AALL to maintain its separate identity.
- If an independent office is established is the law library context lost and is that a bad thing?
- Is it appropriate to have a full-time AALL staff person reporting to a part-time volunteer member?

Summer, 1993—AALL VP-President-Elect Kay Todd names a Task Force on AALL’s Government Relations Activities, with a goal of achieving better coordination of such activities. Chair is Tim Coggins.

**1994**—The AALL Executive Board at its Spring meeting approves a motion to change the status of the Washington Affairs Representative position to an “indefinite, continuing term serving at the pleasure of the President and the Executive Board.” [Note: this is documented in the Task Force report discussed below, at Footnote 16.]

**1994**—On June 21, the Task Force on AALL’s Government Relations Activities submits its Final Report [Posted on AALLNET as pp. 115-129 of the WAO Background Reading found at: [/www.aallnet.org/committee/waor/wao-background-reading.pdf](http://www.aallnet.org/committee/waor/wao-background-reading.pdf)] to the Executive Board. The report contains nine recommendations, five of which specifically refer to the Washington Affairs Representative. Four were adopted by the AALL Executive Board:

- The Washington Affairs Representative should determine when the Assistant Washington Affairs Representative should speak for AALL.
- The Washington Affairs Representative should attend all AALL Executive Board meetings.
- The responsibilities of official representatives to groups involved in government relations activities should be transferred to the Washington Affairs Representative.
- The Washington Affairs Representative should develop an ongoing effort to educate the members of AALL about the Association’s government relations activities and positions on issues. (One way the Task Force recommended this be addressed was that the Washington Affairs Representative should present a brief issue-oriented and substantive discussion of government relations issues at one of the business meetings at each year’s AALL Annual Meeting. This presentation was made each year from 1994 to 2006, but when AALL switched to having just one business meeting at each Annual Meeting, the oral presentation was omitted and only a written report was submitted to the membership.)

The AALL Board did not adopt the recommendation that funds should be budgeted to support travel for those other than the Washington Affairs Representative to testify before Congress.

At the end of June, Susan Tulis concludes her 16-month temporary employment in the full-time staff position of Assistant Washington Affairs Representative and returns to University of Virginia Law Library. During the summer, a search is conducted to find a new individual to fill the position as a full-time member of the AALL staff (rather than an Association member taking a leave from his/her position in a law library in order to do so). Mary Alice Baish, a librarian with government relations experience, is interviewed in August and offered the job. She accepts but because of commitments to her current employer, her starting date is set for early 1995.

**1995**—Mary Alice Baish begins her position as Assistant Washington Affairs Representative in February. In the summer, the Washington Affairs Office, through the efforts of Mary Alice Baish, launches its new web site to promote AALL advocacy activities and to inform AALL members and others of AALL policies and the issues on which the Association has commented

through letters and testimony. This new site, hosted on the server of the Georgetown University Law Center, is designed to promote AALL advocacy activities and to inform AALL members and others about positions which AALL has taken on information policy issues through letters and testimony.

**1996**—Oakley and Baish begin registering annually as lobbyists (on advice of AALL counsel) to comply with requirements of P.L. 104-65, the Lobbying Disclosure Act of 1995.

**1999**—Mary Alice Baish’s title is changed to Associate Washington Affairs Representative.

**2000-2001**—Mary Alice Baish serves as Acting Washington Affairs Representative during Bob Oakley’s term as AALL President.

**2006**—Bryan Stevens is hired for the new position of WAO Advocacy Communications Assistant. He works for several months, but then resigns for personal reasons. The position is filled on a part-time, temporary basis from Feb. through June 2007 by AALL member Elizabeth LeDoux. The position is vacant for the next four months.

**2007**—In January, the WAO Online web site is migrated to AALLNET. In September, AALL is saddened by Robert Oakley's unexpected death and the sudden end of his long tenure as Washington Affairs Representative.

In November, Mary Alice Baish is appointed Acting Washington Affairs Representative. Emily Feldman is hired to fill the vacant Advocacy Communications Assistant position and begins in November, having previously served as the program associate for OpenTheGovernment.org.

**2008**—In February, the WAO launches AALL’s Washington Blawg, a new blog to highlight issues which the Office is tracking, send out action alerts, and point out interesting articles and web sites. Members can subscribe to receive the Washington Blawg by RSS feed or by email.

Also in February, President Ann Fessenden appoints the WAO Review Special Committee (Sally Holterhoff, Chair), which is given the responsibility of assessing the evolution and current role of the Washington Affairs Office as the center of the Association’s government relations activities and of making recommendations for the future direction and continuity of those efforts.

Through the summer, the Committee uses several different methods to gather input from AALL members on their perceptions of the operation of the WAO and does research on the history of the development of the Office.

At the Fall Board meeting in October, the Executive Board considers the Committee's Interim Report and takes the following actions based on the recommendations in that report:

- Changes the name of the office to the AALL Government Relations Office (GRO).
- Establishes a full-time staff position of Director of the GRO and officially discontinues the position of Washington Affairs Representative (which had been filled by an AALL member who received an annual honorarium).

- Extends the term of the Washington Affairs Office Review Special Committee until Spring 2009.

Following these Board actions, Executive Director Kate Hagan proceeds to hire Mary Alice Baish as the first Director of the GRO.

### Suggestions for Further Reading:

Leah Sandwell-Weiss, *Putting Ideals into Action: AALL Washington Affairs Office is the Hub of Law Librarianship's Government Activity*, *AALL Spectrum*, Apr. 2005, at 12. [Note: This article was the winner of the 2006 *AALL Spectrum* Article of the Year Award.] ([www.aallnet.org/products/pub\\_sp0504/pub\\_sp0504\\_Ideals.pdf](http://www.aallnet.org/products/pub_sp0504/pub_sp0504_Ideals.pdf))

Timothy L. Coggins, *The American Association of Law Libraries and Its Government Relations Program* (Parts I & II), in *Law Librarianship: Historical Perspectives* 309 (Laura N. Gasaway & Michael G. Chiorazzi, eds., 1996).

## **APPENDIX B—WAORSC Final Report**

### **Frequently Asked Questions about the AALL Government Relations Office (GRO) in Washington, D.C. (updated as of March 2009)**

- **Who are the Government Relations Office staff members and where do they work?**
- **What is the role of the GRO in the development of AALL positions on information policy issues?**
- **What entities within AALL participate in establishing information policy positions for the Association?**
- **How does the Association determine policy in a new or developing area not already addressed by the Government Relations Policy?**
- **Who is authorized to speak on behalf of AALL regarding information policy positions?**
- **Who determines whether AALL presents testimony at a Congressional or other hearing? Who selects the person to testify and who writes the statement?**
- **What role does the GRO take in addressing information policy issues at the state and international levels?**
- **How can an AALL member learn more about the Association's information policy positions?**
- **What is the history of AALL's involvement in advocacy concerning information policy issues?**
- **How can an AALL member become involved in AALL advocacy efforts or bring an issue to the attention of the GRO?**

#### **Who are the Government Relations Office staff members and where do they work?**

Mary Alice Baish is Director of the Office, where she has worked in various capacities since 1995. Emily Feldman is the Advocacy Communications Assistant. The GRO is currently housed within the Georgetown University Law Center Library, within blocks of the U.S. Capitol.

#### **What is the role of the GRO in the development of AALL positions on information policy issues?**

GRO staff work on information issues in accordance with AALL's Government Relations Policy ([www.aallnet.org/aallwash/grpol.html](http://www.aallnet.org/aallwash/grpol.html)), which also appears in the *AALL Directory and Handbook*. They consult on a regular basis with the Copyright Committee, Electronic Legal Information Access and Citation Committee, Government Relations Committee, and, as appropriate for specific issues, with the President, Executive Director, and/or Executive Board. The GRO closely adheres to policies which have been established by the Association.

#### **What entities within AALL participate in establishing information policy positions for the Association?**

Information policy positions of AALL are established in three primary ways. One method is through three of AALL's policy committees—the Copyright Committee, the Government Relations Committee, and the Electronic Legal Information Access & Citation (ELIAC) Committee—working closely with the GRO. A second method is through action by the AALL Executive Board regarding an information policy issue which has been referred to it by an AALL committee or other group. AALL subgroups work closely with the Board to recommend policy determinations in their specific areas. A third method is through members' use of the resolution process to bring forward an information policy issue for consideration by the Association.

**How does the Association determine policy in a new or developing area not already addressed by the Government Relations Policy?**

Information policies in new or developing areas must be approved by the AALL Executive Board and typically come to the Board in the form of recommendations and/or motions from the Government Relations Office or an AALL committee or task force. In addition, the Executive Board may take action to determine a new policy or such a policy may be brought forward by AALL members through the resolution process.

**Who is authorized to speak on behalf of AALL regarding information policy issues?**

The official and customary spokespersons on information policy matters are the President, the Executive Director, and the Director of the AALL Government Relations Office. According to their charges, the Government Relations Committee and the Copyright Committee may, on their own initiative, in accordance with Committee and Association policy, prepare and communicate Association positions to appropriate governmental bodies and to other interested groups, while keeping the Executive Board informed of all such efforts.

See the *Speaking for AALL* policy ([http://www.aallnet.org/about/policy\\_board\\_whospeaks.asp](http://www.aallnet.org/about/policy_board_whospeaks.asp)) and in print in the *AALL Directory and Handbook*.

**Who determines whether AALL presents testimony at a Congressional or other hearing? Who selects the person to testify and who writes the statement?**

The Government Relations Office monitors significant legislation and legal developments within AALL's areas of interest. If a hearing is scheduled on such an issue, the Association may be invited to or may ask to provide a representative to present testimony. The GRO Director and the AALL President determine the name to be submitted as a potential witness. The proposed witness could be the President, the GRO Director, or a prominent AALL member who has expertise on the topic. If AALL does receive an invitation to testify, the testimony is often drafted by the Director of the Government Relations Office, in consultation with the Government Relations Committee.

AALL also works closely with other library organizations on matters of mutual concern, particularly copyright issues. If AALL and other associations agree on a consensus position, they may select one person to present testimony on behalf of all of them. That testimony may be written by the Copyright Committee in consultation with the GRO Director.

## **What role does the GRO take in addressing information policy issues at the state and international levels?**

Although the GRO focuses primarily on information policy issues at the Federal level, the Office became involved in a state issue in the late 1990s, when AALL took a strong position (<http://www.aallnet.org/aallwash/UCITA2.asp>) in opposition to the Uniform Computer Information Transactions Act (UCITA). This draft uniform state law was being considered by various states and a number of AALL members were successful in efforts opposing it in their states. The GRO is available to assist chapters who are concerned with state issues of information policy and to offer advice when asked. A recent issue at the state level is funding for county law libraries. AALL chapters monitor state issues on an ongoing basis for the AALL Government Relations Committee and the GRO. AALL has also become involved internationally on the issue of copyright (<http://www.aallnet.org/aallwash/international.asp>), seeking to promote balance in copyright law and protect fair use and the public domain.

## **How can an AALL member learn more about the Association's information policy positions?**

The GRO has a web page on AALLNET (<http://www.aallnet.org/aallwash/>). The Association's Government Relations Policy and selected AALL Resolutions are found there and are also included in the *AALL Directory and Handbook*. GRO staff members (whose names and numbers are listed on the GRO web site and in the *AALL Directory and Handbook*) are available to talk with members, as are the chairs of the Copyright Committee, the Electronic Legal Information Access & Citation Committee (ELIACC), and the Government Relations Committee. AALL members are also welcome to contact AALL officers and Executive Board members about the Association's information policy positions.

## **What is the history of AALL's involvement in advocacy concerning information policy issues?**

A compiled history of the Association's advocacy efforts in the past 20 years, *Highlights of the History of the AALL Government Relations Office (formerly the Washington Affairs Office)* is posted [here](#) on the GRO web page.

## **How can an AALL member become involved in AALL advocacy efforts or bring an issue to the attention of the GRO?**

AALL members interested in becoming involved in advocacy are encouraged to contact the Director of the GRO or the current Chair of the AALL Government Relations Committee. Advocacy workshops are held each year in conjunction with the AALL Annual Meeting. AALL members can volunteer to serve on one of the three AALL policy committees. Many of AALL's chapters have government relations committees and this is another way to become involved. Members are encouraged to participate in the AALL Advocacy Discussion forum: aall-advoc. Details for signing up are available [here](#). For current awareness of issues, [subscribe here](#) to the AALL Washington Blawg, which can be received by RSS feed or by email. For a more detailed update, read the "Washington Brief" column in each issue of *AALL Spectrum*.