

American Association of Law Libraries
Professional Development Committee 2002-2003

**Preliminary Report and Recommendations to the AALL Executive Board
on the Future of the Professional Development Program**

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EXECUTIVE SUMMARY

After a comprehensive analysis of the American Association of Law Libraries' recent experiences with its professional development program, the recommendations made by Dr. Sara Cameron May in her report, the relationship between the AALL chapters and the professional development program, and other relevant factors, the Professional Development Committee 2002-2003 (PDC) presents its preliminary report and recommendations on the future of the Association's professional development program to the Executive Board.

The recommendations are described briefly in this executive summary and are developed more fully in the report.

Recommendation # 1:

The Professional Development Committee recommends that the Association discontinue, effective December 31, 2002, all regional programming and other educational offerings through the professional development program (outside the Annual Meeting) until the Board determines which of the alternatives for a professional development program developed by the PDC in this report is the program that the Association will pursue.

Recommendation # 2:

The PDC believes that the workshops selected for the Annual Meeting through the workshop and program proposal process belong appropriately with the Annual Meeting Program Committee. It, therefore, recommends that activities associated with the Annual Meeting workshops (solicitation, review, selection, monitoring, working with coordinators and speakers, and other issues) be returned to the Annual Meeting Program Committee. The PDC recommends that the budgets for Annual Meeting workshops be a part of the Annual Meeting budget.

Recommendation # 3:

The PDC has developed five alternatives for an Association professional development program, ranging from a full-fledged program to no coordinated program with AALL professional development activities handled by several groups within AALL. It, therefore, encourages the AALL Executive Board to review carefully the professional development program alternatives presented in this report, adopt one, consider the financial feasibility of the preferred alternative, and then direct the Professional Development Committee to plan the implementation of that alternative.

Recommendation # 4:

The PDC recommends that the Board and its Strategic Plan sub-committee make certain that education and professional development is emphasized in the next version of the Strategic Plan. Members expect that their professional association recognizes and supports the role of continuing education and professional development in its governing documents.

Recommendation # 5:

Funding for the professional development program continues to be a concern for

members, the Board, and others. Funding for the program has been dependent on the grants and contributions from vendors, but there appears to be unanimous agreement that an Association of AALL's caliber should not support its professional development program through vendor contributions only. The PDC recommends that the Board direct the AALL Treasurer and Director of Finance and Administration to allocate 3% of each member's dues payment to an education line in the budget to support partially the professional development program. (This recommendation may vary depending upon which alternative in recommendation three that the Board elects to support.)

Recommendation # 6:

During its evaluation of the professional development program the PDC saw clearly that no professional development program can succeed without sufficient staff support. Member volunteers contribute significantly and admirably to the program, but they do not have the time to devote to certain issues. The PDC, therefore, encourages the Board to fund the Education Manager position as part of the operating budget of the Association.

Recommendation # 7:

As the Board might expect, there are certain basic assumptions, identified here as principles, that are important to guarantee the success of any program. To sustain an effective professional development program that addresses and meets the needs of AALL members, the PDC identifies six budget "principles" and recommends that the Board adopt these principles.

The PDC includes considerable background and other information in this report to help the Board, the AALL Treasurer, the Director of Finance and Administration, and others assess the financial feasibility of its recommendations and alternatives. The Committee outlines in this report what it believes is the appropriate role Professional Development Committee, but does not put this discussion in the form of a recommendation.

The Committee chair and all members remain available to the AALL Board to answer any questions.

A. History of the Professional Development Program

The American Association of Law Libraries' Strategic Challenge 1994-1998 called for

the development of an “educational policy statement” for the Association. In response to this call the AALL President appointed a Task Force on Educational Policy, consisting of seven Association members, some who were members of the Education Committee for that particular year. The Task Force met twice during 1995-96 to identify and refine an educational policy for AALL and presented its report to the AALL Executive Board for consideration at the Board’s July 18-19 & 25, 1996 meeting.

The Task Force report presented an “educational” policy, later renamed “Professional Development Policy and Structure,” which was adopted unanimously by the Board. (See Appendix A for the text of this Professional Development Policy and Structure.) Another recommendation in the Task Force report disbanded the Education Committee and created two committees. The Executive Board modified some of the recommendations presented by the Task Force and revised the names of the two newly formed committees. The current Professional Development Committee and Annual Meeting Program Committee perform the responsibilities previously handled by the Education Committee and new and expanded duties assigned to those committees by subsequent Executive Boards.

The Professional Development Committee is currently charged with (1) long range planning, (2) setting program priorities based on the educational mission of the Association, (3) directing Association educational related programming and activities, (4) making recommendations and advising the Annual Meeting Program Committee as AMPC prepares the Annual Meeting, (5) establishing and maintaining an ongoing program for the assessment of the educational needs of members and other target audiences, (6) developing and maintaining effective communication concerning educational activities, (7) seeking collaborative educational endeavors as defined by the policies adopted by the AALL Executive Board, and (8) formulating, reviewing, and overseeing standards of professional education for law librarianship. The Association’s existing professional development program was developed by the various Professional Development Committees operating since the creation of the Committee in the Task Force report. As described later, there have been a number of achievements during the early years of the PDC, but a significant one was the development of the Competencies of Law Librarianship, which were approved by the Professional Development Committee and the AALL Executive Board in March, 2001. (See Appendix B for a copy of the Competencies.)

Although Annual Meeting programming, with the exception of workshops offered at the Annual Meeting, is not a responsibility of the Professional Development Committee, the charge to the Annual Meeting Program Committee follows to identify clearly the areas of responsibilities for the two committees. The Annual Meeting Program Committee is charged with selecting “... programs that are consistent with the theme selected by the Vice-President and Director of Programs that takes into consideration recommendations of the Professional Development Committee.” The AMPC (1) oversees implementation of selected programs through the Annual Meeting, (2) sets guidelines for program selection and programs; (3) schedules the committee’s Annual Meeting, (4) meets with the Vice-President and Director of Programs for orientation at the Annual Meeting prior to the selection of programs at the Committee’s fall meeting, and (5) meets prior to the Annual Meeting they are planning to review

proposals and selects Annual Meeting programs. The AMPC, along with assigned AALL staff, monitors and oversees the annual meeting programming process from the development of the theme to the actual presentation and evaluation of the programs at the Annual Meeting. The Committee works closely with coordinators, moderators, speakers, Special Interest Sections, Chapters, and others who present programs and plenary sessions at the Annual Meeting.

Both AMPC and the Professional Development Committee members evaluate and rank workshop proposals for a particular Annual Meeting. After the review by all PDC and AMPC members, a conference committee consisting of selected members of each committee actually selects the workshops. The Education Manager works with workshop coordinators and speakers and shepherds the selected workshops through the Annual Meeting process.

B. Professional Development Programming and Finances 1997 – 2002: a Summary

The following chart represents the activities (workshops, video conferences, articles, Listserv discussions, etc.) that have been presented under the Association’s professional development program (outside the Annual Meeting). (Mary Jawgiel, AALL Education Manager, compiled the information in this section of the report.)

Professional Development Activities: 1997 - 2002

Activity	Number	Attendees/ Participants	Income	Expenses*

Video conferences	3 (144 sites)	3,067	\$40,332**	\$81,577
Online Tutorials	2	1,227	\$0	\$4,000
Moderated Listserv Discussions	18	4,823	\$0	Staff & volunteer time
Pre-AALL Annual Meeting Workshops	19	691	\$142,392	\$63,047
Regional Workshops & Joint Study Institute	28	931	\$206,690	\$114,666
Desktop Learning Series	46	253,000***	\$0	Staff & volunteer time
Totals	116	10,739	\$389,414	\$263,290
With 30% overhead in expenses			\$389,414	\$342,277
With 78.7% overhead in expenses			\$389,414	\$468,656

* Expenses in this chart do not include Education Manager compensation and Association overhead. Other items not included in the chart are public relations and marketing expenses and expenses for meetings of the Professional Development Committee.

**\$9,668 in royalties received from a co-sponsored ARL teleconference in fiscal year 1998-99 is not included in this income.

*** This represents the number of AALL members and others who might have read the *Desktop Learning Series* (recipients of the Spectrum X no. of articles published). This number is not included in the total of attendees/participants identified in the chart above.

The first AALL professional development program (outside the Annual Meeting and not including the former institutes offered regularly by the Association prior to the Task Force report) occurred in October, 1997 as a co-sponsored copyright law workshop in conjunction with the Illinois Library Association. Eighteen individuals registered for and attended the workshop.

Listed below are some professional development program highlights since that first co-sponsored workshop.

- Sixty-nine professional development program educational offerings reached 10,739 participants. Individuals can and have attended and participated in multiple offerings.

- Three satellite video teleconferences (1998, 1999 & 2000) were transmitted to a combined 144 sites and reached 3,067 viewers. Revenues from the satellite video teleconferences totaled \$40,332 (plus an additional \$9,668 from royalties received from a co-sponsored ARL teleconference in fiscal year 1998-99). The expenses for the three teleconferences totaled \$81,577. The difference between the revenues generated and the expenses, \$41,245, was covered through a West Group contribution of \$72,000, which also was used to pay some PDC and marketing expenses.
- Two co-sponsored online tutorials, Copyright Law in 2000 and Licensing in 2002, reached 1,227 AALL members at no charge to individual members. AALL worked with the American Library Association on both these online tutorials. The Association paid ALA \$2,000 for each tutorial, a total of \$4,000.
- Eighteen moderated Listserv discussions have been held since 1998, have reached a total of 4,823 individual participants, and have covered topics ranging from the competencies for law librarianship to integrated systems. The discussions are archived on the professional development page of AALLNET. AALL members do not pay a registration fee to participate in the Listserv discussions.
- Beginning with the 1998 AALL Annual Meeting in Anaheim, there have been a total of nineteen pre-conference workshops. Five workshops have been cancelled during this time period (one in 2001 and four in 2002). Total attendance at the nineteen workshops totaled 691. Total income generated by the workshops was \$142,392, and direct expenses associated with the workshops totaled \$63,057. The Association overhead and Education Manager compensation are not included in this total of \$63,057.
- There have been twenty-seven regional workshops and one Joint Study Institute during this period. Six regional workshops have been cancelled due to insufficient registrations. Regional programming has reached 931 individuals and has generated income totaling \$206,690. Direct expenses for these regional workshops totaled \$114,666. No overhead and compensation costs are included in these figures.
- The *Desktop Learning Series* in the AALL Spectrum has appeared in every issue since March, 1998, except three (Feb. 2000, June 2001, and June 2002). AALL Spectrum is mailed ten times each year to approximately 5,500 individuals, and the Committee's series has appeared in 46 issues. This means that the articles in the Desktop Learning Series potentially have been read 253,000 times (5,500 x 46 issues).

Two conclusions are evident from the preceding information. First, viewed as a comprehensive package of educational offerings from 1997-2002, the professional development program has succeeded and has reached many AALL members. Secondly, the financial problems of the professional development program are attributable in part to two factors: the need to include the Association overhead into each offering and the necessity to include a part or all of the compensation package for the Education Manager in the expenses.

C. Evaluation of the Current Professional Development Program

In 2000-2001 the AALL President initiated a review of the professional development program. Dr. Sara Cameron May, an Educational Project Consultant, was selected to complete this review. Dr. May conducted most of her research between February 1 and March 31, 2001. She collected data through telephone and personal interviews and an analysis of documents relating to the professional development program. Dr. May held in-person interviews with the AALL Executive Director, the Director of Programs, and the Education Manager. Six members of various Professional Development Committees, six chapter presidents, and four members of the AALL Executive Board participated in telephone interviews with Dr. May.

Dr. May submitted her preliminary report to the Professional Development Committee at its March, 2001 meeting and to the Executive Board at its March, 2001 meeting as well. She then submitted her "Final Report: Evaluation of AALL Professional Development Program" with its seventy recommendations to the AALL Board in June, 2001. The Executive Board accepted Dr. May's report and referred the report for further evaluation to a three member Board subcommittee. The subcommittee completed a thorough analysis of the report and submitted its analysis of the report to the Board on October 12, 2001. The subcommittee analysis divided the recommendations into several categories: (1) Refer to the Executive Board (in consultation with the PDC); (2) Refer to the Professional Development Committee; (3) Refer to AALL Headquarters; ((4) Refer to AALL Annual Meeting Program Committee; (5) No Specific Action Needed; Follow Current Procedures; and (6) Table Recommendation for Now. Within each category, the subcommittee identified (A) first priority for consideration and possible action items; (B) second priority for consideration and possible action; and (C) recommendations that could be reasonably dealt with if/when A & B have been addressed.

The Board subcommittee's "First Priority" category of recommendations from the May Report are listed here because they relate specifically to this PDC's review of the professional development program.

1. Sara May Report Recommendations Referred to the Executive Board (in Consultation with PDC)

May Recommendation 2: Develop a professional development Mission statement that, at a minimum, includes these basic components: purpose; content areas; target audience; type of activities provided; expected results of the overall program. (See Appendix C for the drafts of the mission and vision statements drafted by the Board subcommittee and reviewed by the PDC.)

May Recommendation 23: Develop a sound business plan to effectively manage the resources and establish funding mechanisms.

May Recommendation 1: The Executive Board must reach consensus on what they expect the PDC and/or the professional development unit to achieve and how the results will be measured.

2. Sara May Report Recommendations Referred to the PDC for Consideration and Possible Action

May Recommendation 11: The PDC should take overall responsibility for ensuring that policy or “ends” determined by consensus of the Executive Board are carried out by overseeing, at the strategic level, all professional development activities.

May Recommendation 22: Design and establish a professional development curriculum from vehicles discussed below that ensures the highest possible quality of programming that will surprise and delight members.

The Professional Development Committee members received Dr. May’s final report in June, 2001 at the same time that the Executive Board received the report. The Committee discussed the May Report, but did not begin its comprehensive review until Committee members received the Board subcommittee analysis in October, 2001. During its review of the May Report and the Board subcommittee analysis, the PDC has been especially cognizant of the recommendations listed in the “First Priority” category of the subcommittee analysis.

To complete its analysis, the Professional Development Committee looked closely at the history and development of the professional development program as well as the May Report. Committee discussions centered on several interrelated issues associated with the professional development program that also were addressed by Dr. May. The first issue deals with the policies, processes, and procedures developed and followed by the Committee and staff during the development and implementation of a professional development program. A determination of what is the appropriate curriculum for an AALL professional development program is the second major issue. Conducting needs assessments to determine what members want, creating a program that is attractive to chapters, chapter members, and AALL members, developing specific workshops and programs, determining appropriate delivery methods, and assessing the intended audience (members only, outside groups, or a mixture) comprise the elements of the second issue. The third major issue deals with finances, including the cost of workshops, members’ perception that the registration fees are too high, the AALL overhead issues, and the development of models that will permit the professional development program to become financially sound. The fourth issue deals with collaboration between the Professional Development Committee, the Annual Meeting Program Committee, AALL chapters, and AALL Special Interest Sections. Many chapters believe that they can provide the same quality programming at a more affordable price for their members. The final issue focuses on AALL

collaborative efforts with allied for-profit and not-for profit associations and organizations and offering members links to programs from other groups. The PDC's discussion and analysis of these issues impact the recommendations in this report.

D. Direction to the Professional Development Committee from the AALL Executive Board

In November, 2001 the PDC received an additional direction from the Executive Board. The following was presented to the Professional Development Committee after the Executive Board's November, 2001 meeting:

1. Given that the current Professional Development Program is financially unfeasible the Executive Board directs the Professional Development Committee to design new professional education program alternatives which are financially sound. The PDC's work should be carried out in two phases:
 - a. Phase 1: PDC should think through recent experiences with the Program, the recommendations made by Sara Cameron May in her report, the relationship with the Chapters, and all other relevant factors, and present preliminary recommendations for a redesigned program to the Board for their meeting in November 2002. These preliminary recommendations will be reviewed by the staff, the Treasurer, the F&B Committee, and the PDC for financial feasibility after the November 2002 Board meeting. This review will be completed by January 2003.
 - b. Phase 2: Based on the results of Phase 1, PDC should submit a final report prioritizing its recommendations after the Board's meeting in July 2003.
2. While the PDC is producing its preliminary report, the Professional Development Program will be continued to the extent that is made possible by the BNA contribution of \$40,000 during calendar year, January - December 2002; staff in consultation with the PDC will determine the level of regional programming which can be accomplished within the amount of the BNA donation.

The Committee addressed this new charge at its November, 2001 meeting and subsequently developed the process outlined in Appendix D to gather information, plan strategies, discuss issues, and develop its preliminary report and recommendations for the Board.

E. Overarching Issues

Prior to its recommendations, the Professional Development Committee believes that it is necessary to highlight three important issues: the importance and necessity of an Association

professional development program; Association staffing for a professional development program; and the role of the Professional Development Committee.

1. Importance and Necessity of an AALL Professional Development Program

The Professional Development Committee believes strongly that it is the responsibility of an association as strong and active as the American Association of Law Libraries to provide educational and professional development opportunities for its members. The Annual Meeting is an extremely successful educational activity for the Association, but it does not address the educational needs of all members. Many AALL members identify professional development and education as the primary focus for the Association. The recent dues increase initiative also included statements about support for the professional development program because of demand from members. The Committee further believes that the funding for a professional development program must be included in the operating budget for the Association. The Committee recognizes that a professional development program is expensive for any association and further recognizes that the AALL currently might not be able to fund the type of professional development program envisioned by its members, including the members of the Professional Development Committee. The Committee, therefore, presents five alternatives later in this report to give the Board the opportunity to determine (1) which alternative addresses members' needs and (2) whether that alternative is financially feasible.

2. Staffing for a Professional Development Program

The PDC cannot stress strongly enough the importance of the Education Manager position. It is a vital position for the Association, and the PDC hopes that the Board will be able to fund this position in the Association operating budget. During the Committee's deliberations about the program, it became absolutely clear that a successful professional education program requires a staff member dedicated to the program. The PDC envisions the position responsibilities to include (1) coordinating professional development/education activities, (2) working closely with volunteers and presenters on programming and logistics issues, (3) investigating new, cutting edge type programming and notifying PDC members about the pros and cons of these new endeavors, (4) coordinating professional development agreements with other associations such as ALA and commercial companies such as West, (5) handling ongoing responsibilities (such as updating the professional development web page, supporting the PDC chair by compiling reports, statistics, etc., and accepting registrations for workshops, Listserv discussions, and online tutorials), and (6) other duties as outlined in the current Education Manager position description. Members simply do not have the time to participate actively in ongoing investigations and monitoring of professional development activities.

3. Role of the Professional Development Committee

The PDC talked extensively about its role within the Association, focusing on whether its duties are to be limited to policy making only or whether it assumes responsibility for other functions. The May Report suggested several responsibilities for the Professional Development

Committee, and two of these recommendations were included in the “First Priority” category by the Board subcommittee reviewing the report.

Recommendation 11 in the May Report states that “[t]he PDC should take overall responsibility for ensuring that policy or ‘ends’ determined by consensus of the Executive Board are carried out by overseeing, at the strategic level, all professional development activities.” The current Professional Development Committee supports this recommendation in the May Report and believes that it is the role of the Committee to serve as a professional education/development policy making group for the Association. Dr. May’s twenty-second recommendation states that the Association should “[d]esign and establish a professional development curriculum from vehicles discussed below that ensures the highest possible quality of programming that will surprise and delight members.” The Committee believes that its role is to provide direction to the Board on the appropriate curriculum, and the recommendations of the PDC to the Board outline some alternatives to accomplish this goal.

In addition to handling the responsibilities in these two May Report recommendations, the PDC has identified the following responsibilities for the Committee. Most of the activities/responsibilities identified below can be performed and/or coordinated by the PDC with some assistance from AALL staff. (In many instances the responsibilities listed here are currently handled by the PDC.) The Committee does not present this information as a recommendation since these duties fall mostly within the current charge to the PDC.

1. Work with the Board to finalize the professional development mission and vision statements. (The statements by necessity will be based on the alternative selected by the Board as the financially feasible one). (Current drafts of the statements are in Appendix C.)
2. Perform the policy making and other responsibilities assigned to the PDC in its current charge, but diligently review the charge and determine what changes need to be made.
3. Review the Competencies of Law Librarianship regularly and update competency statements as necessary.
4. Review regularly the AALL Strategic Plan initiatives to make certain that the Professional Development Committee is performing responsibilities assigned to it in the current plan and make recommendations to the Board about changes necessary when the next Strategic Plan is developed.
5. Continue the *Desktop Learning Series* as a regular feature in each issue of the AALL Spectrum with a team of Professional Development Committee members coordinating topics, authors, etc., and working closely with the Editorial Director of the AALL Spectrum.
6. Continue the moderated Listserv discussions with a team of Professional Development

Committee members coordinating topics and moderators, working closely with SISs and others to develop topics, etc., and working closely with AALL staff to handle the technical aspects.

7. Develop further the professional development page on AALLNET to create a fully integrated PDC and professional development page, to create links to other locations for professional development opportunities, etc.
8. Analyze thoroughly and completely the Annual Meeting program session evaluations completed by members and share the analysis with the Annual Meeting Program Committee in a timely manner for effective use during the planning process for the Annual Meeting.
9. Work closely with the Special Interest Sections and the Chapters to provide assistance with professional development activities and increase communications with Chapters and SISs to guarantee that those groups view the PDC as a resource (this includes the continuation of presentations to the SIS Council and the Council of Chapter Presidents at the Annual Meeting each year).
10. Continue the Chapter Professional Development Training Roundtable at the Annual Meeting.
11. Continue to evaluate Chapter programming for the chapter professional development awards program and forwarding the names of the top ranked programs to the AALL Awards Committee each year.
12. Review, analyze, and evaluate various delivery mechanisms as alternatives to face-to-face meetings and offer members access to these opportunities if cost and resources permit. (This likely would require substantial assistance from AALL staff.)
13. Investigate the possibility of developing a clearinghouse of successful chapter and AALL annual meeting programs, perhaps speakers and topics, programs, etc., to share with chapters through the professional development page on AALLNET. (This would require some assistance from AALL staff.)
14. Work closely with the Special Committee to Develop Performance Measures for Law Librarians and other standing and special committees as necessary and/or directed.

F. Professional Development Committee Recommendations

The Committee identifies seven recommendations here. Recommendations 4 through 7 are dependent on how the Board deals with recommendation 3. The PDC presents five alternatives for the Board to consider as a part of recommendation 3. Because the discussion of

those five alternatives is lengthy, the alternatives are presented in section F.2 below after recommendation 7.

1. Recommendations

Recommendation # 1: Discontinue, effective December 31, 2002, all regional programming and other educational offerings through the professional development program (outside the Annual Meeting) until the Board determines which alternative listed below that it believes the Association will pursue.

Since the funding for the professional development program is limited and since the Education Manager's position is scheduled to end on December 31, 2002, the PDC believes that the Association should not attempt to offer any regional programming or educational offerings through the professional development program. Staff assistance is necessary for regional programming to handle the registrations, materials compilation and distribution, and other activities. Staff assistance is necessary to offer any online tutorials as well. The Professional Development Committee would perform as many of the duties outlined in section E. 3. of this report as possible, but will not be able to accomplish some of those without staff assistance.

The Education Manager has been directed to site programs in FY03 if possible, but there remains a question regarding who would staff those programs if siting the programs is successful. (Note: This recommendation may not be necessary, depending on the Board's decision about continuation of the professional development regional programming.

Recommendation # 2: Return the solicitation, review, selection, monitoring, working with coordinators and speakers, and other activities associated with the Annual Meeting workshops to the Annual Meeting Program Committee. The budgets for Annual Meeting workshops would be a part of the Annual Meeting budget as well.

The Professional Development Committee believes that the workshops that are selected through the regular workshop proposal process each year logically belong with the Annual Meeting. The AMPC selects the programs for the Annual Meeting and better understands how workshops might enhance the Annual Meeting and create a balanced educational offering for the membership. Most members as well believe that workshops held in conjunction with the Annual Meeting are part of the Annual Meeting. The PDC believes that it is an artificial distinction to assign the workshops to the professional development program and the rest of the Annual Meeting to the AMPC.

However, the PDC might work collaboratively with AMPC and others to present workshops that are part of the regular professional development curriculum as workshops prior to the Annual Meeting. If this occurs, then the responsibility for those workshops would remain with the PDC, and the budget for those workshops would be included in the professional development budget. Examples of this type of workshop might be the collaboration with

LexisNexis for the TRIALL and TRICLL workshops and Law for the Non-J.D., which is a regularly occurring workshop in the professional development curriculum

Recommendation # 3: The Professional Development Committee encourages the AALL Executive Board to review carefully the professional development program alternatives presented in section F.2. below (following recommendation 6), adopt one, consider the financial feasibility of the preferred alternative, and then direct the Professional Development Committee to plan the implementation of that alternative.

The Professional Development Committee discussed comprehensively all the issues associated with the Association's professional development program, the May Report, and what type of program would best meet the needs of Association members. The PDC believes that it is the responsibility of the AALL Executive Board to determine the direction of the professional development program and presents below several alternatives for the Board to consider and for the staff, the Treasurer, and the Finance & Budget Committee to review for financial feasibility. The alternatives are presented with information about (1) the curriculum and/or services provided, (2) member benefits, (3) Association benefits, (4) support/staff needed, (5) income, (6) expenses, and (7) other costs/liabilities. A chart reflecting "snapshots" of the alternatives follows the description of the various alternatives.

If the Board adopts an alternative that includes professional development opportunities and activities that go beyond the duties and responsibilities of the volunteer Professional Development Committee, then the Board must consider the following recommendations.

Recommendation # 4: The PDC recommends that the Board and its sub-committee developing the next Strategic Plan clearly identify the importance of professional development and education in the plan and the mission statement for the Association.

AALL seems to have changed its focus/mission with each Strategic Plan over the years. This is understandable and expected. It appears from looking at the various documents that AALL has not seemed to place as high a value on an educational component as members seem to assume that they should be receiving. AALL, as a professional organization, needs to recognize the importance of education in its governing documents. Professional development for members should be a given within the Association and needs to appear in AALL documents

Recommendation # 5: To support a professional development program the PDC recommends that the Board direct the AALL Treasurer and Director of Finance and Administration to allocate 3% of each member's dues payment to an education line in the budget.

Most Association members view education and professional development as one of the most significant and important activities of the Association. Yet, the Association does not

budget any portion of the dues and other income to an “education line” in the budget, other than the Annual Meeting. To adequately develop and offer a professional development program the Board must correct this situation. The Professional Development Committee recommends that the Association begin allocating each year 3% of each member’s dues to an education line in the operating budget. The PDC encourages the Board to begin this process with the 2004 FY budget.

Income from professional development activities would be deposited into this line as well, and the education line would be treated just like all other budgeted items in the operating budget. Funds remaining at the end of the year would revert to the reserve funds. (This recommendation is duplicated later in the “Budget Principles” section, but the Professional Development Committee stresses the need for the Association to recognize that professional development is a member expectation, just like the Law Library Journal, the AALL Spectrum, etc., and, therefore, it is appropriate that professional development activities be recognized in the operating budget.)

Recommendation # 6: The Professional Development Committee encourages the Board to fund the Education Manager position as part of the operating budget of the Association.

A professional development program cannot survive without staff support, and the AALL professional development program cannot survive financially as long as the compensation package for the support position is factored into the registration fees charged for workshops and other programs. As described earlier in this report (see section E. 2.), the Education Manager position is crucial to the success of the program.

It is important to note the tremendous difference in the normal Association overhead (approximately 30%) and the 78.7% overhead that has been added traditionally to professional development program activities. The program would have succeeded financially during the 1997-2002 period if only the normal Association overhead had been assessed to the program (income = \$389,414; direct expenses + 30% overhead = \$342,277). However, when the 78.7% overhead is applied, then the program during that time period loses almost \$100,000. (See chart in section B. above.)

Recommendation # 7: The Professional Development Committee recommends that the Board adopt certain budget “principles,” which are designed to sustain an effective professional development program that addresses the needs of the members.

The budget principles outlined by the Professional Development Committee follow. These principles state more succinctly ideas and issues that have been raised throughout this report.

Budget Principle 1: The American Association of Law Libraries will offer its members a

professional development program, comprised of various types of programming offered in different formats and medium to meet the needs and objectives of a diverse membership and to guarantee that the Association both retains current members and attracts new members.

Budget Principle 2: To assist with the development and continued success of a professional development program the Board will establish an “education” line in the Association budget. Income from programming (“pure deliverables”) will be placed in this line, and expenses from the program will be subtracted from this line.

Budget Principle 3: The Association will allocate and deposit 3% of every membership fee into the education line of the operating budget each year. Like other lines in the operating budget, funds remaining in the line at the end of the fiscal year will revert into the reserve fund.

Budget Principle 4: The professional development program for the American Association of Law Libraries will be self-supporting based on the income from various types of programming and the established education budget, but will not be viewed by the Association as a money-making endeavor.

Budget Principle 5: The professional development program will be treated like all other Association provided services and, therefore, should only be assessed the standard Association overhead (approximately 30%), rather than a larger overhead (approximately 78%) that is designed to cover the compensation package of the Education Manager position. As such, the Association’s risk analysis that is applied to all other Association activities will be applied to professional development programs as well.

Budget Principle 6: Professional development program registration fees will be set using a modified version of the industry standard recommended in the Sara May Report. The modifications will be based on “affordable to members” factor to be considered based on programming and location and the actual programming itself, i.e., whether it offers a unique opportunity for the Association and its members and, therefore, the Association gains substantially even if the individual program suffers a deficit.

2. Professional Development Program Alternatives

The PDC presents five professional development alternatives for the Board to consider. A chart with a “snapshot” of each alternative follows the description of the various alternatives.

Alternative A: Fully Developed Professional Development Program

The fully developed professional development program is the most comprehensive

alternative and offers Association members educational offerings at various times throughout the year in different formats.

Curriculum/Services:

Variety of programming offered in different mediums and formats, including face-to-face, print, web-based, and others, including 4 moderated listserv discussions, 2 online tutorials, 10 *Desktop Learning Series* articles in the AALL Spectrum, 1 institute (face-to-face workshop patterned after the institute concept used earlier in the Association's history), a "cluster" concept of three or four face-to-face workshops directed to different segments of the AALL membership offered in the same location with some joint activities (receptions for example), 1 experimental type program based on the cutting edge technology of the day. Alternative A also would include chapter leadership training about professional development and education, needs assessments and analysis of Annual Meeting programs to ensure that the Annual Meeting is meeting members' needs, review and development as necessary of the Competencies of Law Librarianship, and the type of joint endeavors and collaboration with other associations and groups that occurs currently and might include a more significant publications components such as workbooks and proceedings from various face-to-face and other educational offerings available for purchase by individuals who did not attend the event. All "Curriculum/Services" identified in alternatives B-D not mentioned here would be included in Alternative A.

Member Benefits:

The benefits to the Association member under Alternative A are clearly the most significant. Many educational opportunities would be available to a wider audience and available in both face-to-face and technology-based, in-house formats. With this variety of educational opportunities members would be able to address the needs outlined in the Competencies of Law Librarianship. Members and their institutions would benefit significantly from the increased learning/skills building that members would have available to them through Alternative A.

Association Benefits:

A significant professional development program could potentially increase the membership of the AALL. Alternative A would likely make it easier for the Association to retain members once they join; members would see the Association as meeting one of the expectations that members have for the Association. Alternative A provides the Association with another means to continue its tradition of member-oriented education services and likely would generate considerable "good will" among the members.

Support Staff/Member Duties:

Alternative A would require dedicated staffing. Volunteer members simply cannot perform many of the regular, ongoing responsibilities necessary to keep a full-fledged professional development program working and do not typically have the time to investigate new and cutting-edge types of training, making use of the ever changing technology available for these purposes. Staffing to support the professional

development program must be in addition to the Director of Programs, Director of Publications, Senior Administrative Assistant for Programs, and Web Master.

Income:

The income from this type of programming endeavor could be significant. The Professional Development Committee believes that the Association could base most of its registration of these programs and activities on the industry standard, as outlined in the Sara May Report, but also believes that there are certain activities and opportunities that must be presented and a lower registration fee might be necessary. The professional development program would be supported somewhat by an education line in the operating budget of the Association and income from the pure deliverables provided through the professional development program would be deposited into this education line. Staffing compensation to support the professional development program would be treated the same as all other Association staff, that is, the professional development program would not be charged staff compensation expenses. Rather, activities presented through the professional development program would be assessed the same Association overhead as other Association activities, but no more than the regular Association overhead. The Professional Development Committee suggests that a designated percentage (3%) of membership dues income be deposited into the education line each year. This budgeted amount for the professional development program would then be treated just like other budget lines in the budget (risk analysis applied to it, excess returned to the reserves at the end of the year, etc.)

Expenses:

Alternative A would clearly have the most expenses. But, as mentioned above, the staffing for the professional development program would not be charged to the professional development program. Staff compensation for professional development would be handled as all other Association staff positions. In addition to the direct expenses of programming, professional development activities would be assessed the standard Association overhead, but no more. Expenses related to public relations and marketing of the professional development program would be handled through the Association's standard overhead that is assessed to professional development activities.

Other Costs/Liabilities:

The other costs associated with Alternative A include one meeting of the Professional Development Committee, other than its traditional meeting(s) at the Annual Meeting.

Alternative B: Limited Professional Development Program

Alternative B would be similar to Alternative A, but with one significant change which would affect member benefits, Association benefits, and the other categories. Alternative B would include little, if any, actual programming. Programming opportunities under this Alternative would be dependent on funding available from vendors and other sources and the

good will of sister organizations like the American Library Association.

Curriculum/Services:

Limited face-to-face and other programming (dependent on vendor and other funding); 2 online tutorials (dependent on ALA allowing AALL members to join at no costs); satellite or video conferences (dependent on support from other groups/organizations); chapter leadership training; moderated listserv discussions; *Desktop Learning Series* articles; competencies review; alternative medium analysis; needs assessment; strategic planning.

Member Benefits:

The member benefits under Alternative B would be significantly reduced from the benefits identified in Alternative A. There would be reduced professional development opportunities available for members. Those offered would be dependent on funding from outside groups, such as other associations and vendors. This Alternative likely would not meet the members' professional development needs.

Association Benefits:

Members might believe that the Association is more appropriately responding to the current economic reality – there are insufficient funds to support a full-fledged professional development program. The other benefit to the Association might be that this alternative has a reasonable chance to succeed, although the PDC must point out that the Association has essentially been operating its professional development program under this alternative.

Support Staff/Member Duties:

If the Education Manager position is eliminated, some professional development work might have to be outsourced if there is vendor funding to support programming activities. Member volunteers would perform most duties and responsibilities under this alternative.

Income:

Income from registrations insignificant; vendor contributions could vary.

Expenses:

Covered by contributions and grants from vendors or offered gratis by other associations.

Other Costs/Liabilities:

Members might perceive the Association as not providing the types of services and opportunities that they are entitled to through dues payments. The Association likely would have an image problem since its sister associations would view the Association as not meeting its members needs. There might be a reduction in members, and the retention rate might be lower.

Alternative C: Professional Development Committee – Without Dedicated Staff Support

Alternative C is essentially what the PDC is doing currently, handling many duties and responsibilities that do bring in little if any income, but this alternative requires staffing support.

Curriculum/Services:

Moderated listserv discussions; *Desktop Learning Series* articles; chapter leadership training; competencies review; alternative medium analysis; needs assessment; strategic planning; no services/curriculum that require registration fees, staff support, or expenses to accomplish.

Member Benefits:

Decreased even more from those available to members in alternative B above, but some opportunities for professional development and education through the print articles and electronic discussions. No costs for activities to members.

Association Benefits:

Members see a few professional development opportunities in print and through electronic discussions, so may believe that the Association is addressing somewhat the educational needs of members.

Support Staff/Member Duties:

No full-time staff support, but will need some technical assistance to handle the electronic services such as the moderated listserv discussions.

Income:

None.

Expenses:

Might be some outsourcing expenses if technical assistance for the moderated listserv discussions cannot be supported by AALL staff.

Other Costs:

Same ones identified in alternative B: image problems; member satisfaction and dissatisfaction; retention of members; Association not meeting members' needs; members looking elsewhere (i.e., to other associations) for support.

Alternative D: Professional Development Committee - Limited Responsibilities

Alternative D includes no professional education opportunities and requires no staff support.

Curriculum/Services:

Needs assessment; Annual Meeting evaluation analysis; competencies review; investigation of alternative delivery formats and offerings from other groups and associations; strategic planning; chapter leadership training.

Member Benefits:

Services in this alternative are more “passive” in nature and likely will not be viewed by members as supporting their needs.

Association Benefits:

Needs assessments and Annual Meeting evaluation analysis would help the Annual Meeting Program Committee plan a better and more satisfying annual meeting, but the benefits to the Association are negligible under this alternative.

Support Staff/Member Duties:

No dedicated staff support; responsibilities all handled by members.

Income:

None.

Expenses:

None, unless the Association contracted with an organization to complete a more formal needs assessment.

Other Costs/Liabilities:

Same liabilities as identified in B and C above.

Alternative E: No Professional Development Committee – Duties Transferred to Other Member Groups

Under Alternative E there would be no professional development program and no Professional Development Committee. The responsibilities currently handled by the Professional Development Committee would be transferred to other groups/committees or would not be performed. The advantages of this Alternative are obvious – no funds necessary to support professional development activities. The disadvantages are obvious as well.

Curriculum/Services:

Annual Meeting workshops would be transferred to the Annual Meeting Program Committee (earlier the PDC recommended that this occur regardless of what the Board decides about a professional development program). Educational policy issues would be handled by the AALL Executive Board or assigned to a special task force or special committee by the Board. The *Desktop Learning Series* would be handled by the AALL Spectrum editor or discontinued. Moderated listserv discussions likely would disappear, although the SIS Council might want to take on this responsibility with some AALL staff

support. The Chapter Professional Development Awards would disappear as would the chapter professional development training at the Annual Meeting.

Member Benefits:

No portion of the members' dues would be necessary to support professional development activities. There might be a possibility that dues would increase at a slower rate.

Association Benefits:

There would be savings since there would be no compensation package for an Education Manager position. There would no expenses for a Professional Development Committee. The Executive Board could, therefore, re-direct any funds allocated to professional development to other lines.

Support Staff/Member Duties:

No Education Manager position would be required, and no Professional Development Committee would exist.

Income:

None.

Expenses:

No direct expenses.

Other Costs/Liabilities:

The Association likely would suffer if there was no professional development program. Its image among its members and other associations would suffer. Members likely would feel that the Association was not fulfilling its mission and their expectations. There would be no central coordination of professional development activities, thus the activities would be fragmented. As a result, there might be a constant and recurring re-hashing of professional development issues and concerns. If some of the professional development activities continued, there might be increased responsibilities for some Association staff, which might result in increased salaries, less satisfaction with positions and more turnover, or other intangible results.

Professional Development Program Alternatives

Alternatives	Curriculum/ Services	Member Benefits	Association Benefits	Support Staff/Member	Income	Expenses	Other Costs
A.	4 listservs;	Educ.	Membership	Staff support	Sara May	Fully within	one PDC

Fully Developed Professional Development Program	2 tutorials; 10 desktop learning series; 1 institute; 3-4 clustered face-to-face workshops; 1 program of experimental nature; chapter leadership training; workshop materials published; collaboration with other groups and our own entities; all in B-D below not identified here	opportunities available more widely; fulfilling charge, mission, and vision statement; participating in the Strategic Plan; helping members meet the competencies; member education and professional development; coordination of educational policies and practices	increased; retention of current members; maintain tradition of programming; good will with members; coordination of educational policies and practices	needed (in addition to the Director of Programs, Director of Publications, Editor of Spectrum, Sr. Administrative Assistant for Programs, Web Master)	standard; marketing (costs recovered by PDC income); PDC self supporting, not money making, education line in the operating budget with funds from education deliverables; staff funding to come from AALL operating budget (standard overhead); reasonable request from dues to create an education line in the operating budget	the operating budget; standard overhead as set by the financial policies, but not excessive; charge programs at the Sara May industry standard but modified	meeting outside the Annual Meeting
Alternatives	Curriculum/ Services	Member Benefits	Association Benefits	Support Staff/Member	Income	Expenses	Other Costs
B. Limited Professional Development Program	2 tutorials (ALA dependent); satellite programs perhaps (with support from other groups or vendors); chapter pd leadership training; face-to-face programs if funding available; moderated listserv discussions; Desktop learning series articles; competencies review; Annual Meeting evaluation assessment;	Benefits in A. reduced significantly; diminished opportunities	Better serves current economic reality; more realistic chance for success	Support is outsourced (if Education Manager position is eliminated); member volunteers doing most of the work	Little income; vendor funding perhaps	Limited expenses, covered by funding by vendors or gratis from other associations	Member dissatisfaction; image issues; retention of members affected; one PDC meeting outside the Annual Meeting for coordination purposes

	alternative medium analysis; needs assessment; strategic planning						
C. PDC – Without Dedicated Staff Support	Desktop learning series articles; moderated listserv discussions; competencies review; Annual Meeting evaluation assessment; chapter pd leadership training; alternative medium analysis; needs assessment; strategic planning; nothing that requires registration fee	Decreasing even more significantly; reaching a smaller audience; not meeting the needs of those who learn in face-to-face sessions	Members see some professional development opportunities; no cost to members	No dedicated staff support but with some assistance from technical staff or outsourced	None	Staff support or outsourcing costs	Same as B, but more dissatisfaction; no PDC meeting outside the Annual Meeting
Alternatives	Curriculum/ Services	Member Benefits	Association Benefits	Support Staff/Member	Income	Expenses	Other Costs
D. PDC – Limited	Competencies review; alternative medium analysis; needs assessment; strategic planning; chapter pd leadership training	No perceived benefits to members; services more passive	Decreasing benefits	No dedicated staff support	None	Outsourcing costs for needs assessment if done	Same as B and C
E. No PDC – Duties Transferred	Annual Meeting workshops to AMPC; Educational policy issues to Board; Desktop learning series to Spectrum; Listserv discussions disappear; No chapter pd	Members not asked to pay for a professional development program (no more expenses for the program); dues might not increase at same rate	No Education Manager position, thus savings in compensation package; no PDC expenses	No dedicated staff; no PDC	None	No direct expenses	Image of the Association suffers; more responsibilities for existing staff; constant re-hashing of professional development and educational issues; no central

	awards; no coordination or oversight of educ. issues						coordination; fragmentation of pd issues
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G. Conclusion

The 2001-2002 and 2002-2003 Professional Development Committees greatly appreciate the opportunity to study the professional development program for the American Association of Law Libraries and to present this preliminary report to the AALL Executive Board. The Committee looks forward to the Board and AALL staff responses and the opportunity to work further with the Board to create and provide the professional development opportunities that AALL members need, expect, and deserve.

Respectfully submitted on behalf of the 2002-2003 Professional Development Committee by,

Timothy L. Coggins, Chair

Appendix A

AALL Professional Development Policy and Structure
 (approved by the AALL Executive Board, July, 1996)

1. To provide members and non-members with educational opportunities consistent with the AALL Mission Statement.
2. To provide members with readily available, high quality and timely educational programs, publications, and services in a variety of formats, using all available and future technologies in order to enable members to remain current in the profession of law librarianship.
3. To provide members with educational opportunities enabling them to meet core competencies for law librarianship.
4. To provide non-members with comparable educational opportunities in our area of

expertise.

5. To engage in collaborative educational endeavors with for profit and not-for profit organizations, including AALL Chapters.

Appendix B

COMPETENCIES OF LAW LIBRARIANSHIP

The American Association of Law Libraries seeks to define the profession of law librarianship and its value to the legal field, today and in the future, by identifying, verifying, and actively promoting competencies of law librarianship. Competencies are the knowledge, skills, abilities, and personal characteristics that help distinguish superior performance.¹ These competencies may be acquired through higher education such as library and information science programs², through continuing education, and through experience.

The first section, “Core Competencies,” includes those that apply to all law librarians, and will be acquired early in one’s career. The subsequent sections are related to specific areas of practice. Some law librarians (for example, solo librarians or librarians in smaller institutions) may have multiple responsibilities and need to be proficient in more than one of the “Specialized Competencies.” Other law librarians may specialize in just one area or in a subset of one area.

¹ Kenneth H. Pritchard, CCP. Society for Human Resource Management White Paper, August 1997, reviewed April 1999.

² See “AALL Guidelines for Graduate Programs, November 1988; AALL Professional Development Policy, July 1996

Individual librarians may use the AALL Competencies for coordinating their continuing education as they identify areas for professional growth. Employers may use the Competencies to make hiring, evaluation and promotion decisions, and to make recommendations for professional development. The American Association of Law Libraries uses the Competencies as a framework within which to structure professional development programs. This framework provides guidance to ensure that the programs offered will assist law librarians in attaining and maintaining the skills or knowledge necessary for their current and future work.

8. Core Competencies

Core Competencies apply to all law librarians and will be acquired early in one's career.

8.1 Demonstrates a strong commitment to excellent client service

8.2 Recognizes and addresses the diverse nature of the library's clients and community

8.3 Understands and supports the culture and context of the library and its parent institution

8.4 Demonstrates knowledge of the legal system and the legal profession

8.5 Understands the social, political, and economic context in which the legal system exists

8.6 Demonstrates knowledge of library and information science theory, information creation, organization, and delivery

8.7 Adheres to the Ethical Principles of the American Association of Law Libraries and supports the shared values of librarianship³

8.8 Exhibits leadership skills including critical thinking, risk taking, and creativity, regardless of position within the management structure

8.9 Demonstrates commitment to working with others to achieve common goals

8.10 Acts within the organization to implement the principles of knowledge management

8.11 Exhibits an understanding of the importance of a multidisciplinary and cross-functional approach to programs and projects within the organization

8.12 Shares knowledge and expertise with clients and colleagues

8.13 Displays excellent communication skills and is able to promote the library and advocate for its needs

8.14 Communicates effectively with publishers and other information providers to advance the interests of the library

8.15 Recognizes the value of professional networking and actively participates in professional associations

8.16 Actively pursues personal and professional growth through continuing education

³ American Association of Law Libraries Ethical Principles, 1999

SPECIALIZED COMPETENCIES

Specialized Competencies relate to specific areas of practice. Some law librarians may have multiple responsibilities and need to be proficient in more than one of the Specialized Competencies. Other law librarians may specialize in just one area or subset of one area.

2 Library Management

1.1 Engages in a continual process of long-range planning

1.2 Plans, prepares, and controls budgets and manages all financial resources

1.3 Selects, supervises, evaluates, and provides for the training and development of library personnel

1.4 Understands the principles of project management and organizes people to accomplish complex tasks

1.5 Measures, evaluates and articulates the quality of the library's services

1.6 Ensures the optimal use of library facilities to accommodate the evolving needs of clients and staff

1.7 Provides leadership within the parent organization to ensure that the library is vital to that organization

1.8 Maintains an understanding of trends and developments in publishing and the information industry

1.9 Tracks, anticipates, and influences changes in policy and legislation that impact the library and the profession

2 Reference, Research, and Client Services

2.1 Provides skilled and customized reference services on legal and relevant non-legal topics

2.2 Evaluates the quality, authenticity, accuracy, and cost of traditional and electronic sources, and conveys the importance of these to the client

2.3 Assists clients with legal research using both print and electronic resources

2.4 Assists non-lawyers in accessing the law, within the guidelines provided by the American Bar Association's Model Code of Professional Conduct and other applicable codes

- 2.5 Aggregates content from a variety of sources and synthesizes information to create customized products for clients
- 2.6 Creates research and bibliographic tools (handouts, aids, pathfinders, bibliographies) on legal and related topics
- 2.7 Monitors trends in specific areas of the law

3 Information Technology

- 3.1 Understands the practical application of creating, accessing, and managing information including databases, integrated library systems, client-server applications, hardware, software, networks, and electronic information resources
- 3.2 Evaluates the need for new and evolving technology and implements required changes
- 3.3 Conducts long-range planning and policy formulation for computer services and training needs
- 3.4 Evaluates, purchases, implements, and tests software and hardware necessary for accessing electronic information
- 3.5 Assists and educates clients and colleagues in the use of the library's information systems
- 3.6 Resolves library hardware, software, local area network, website and Internet connectivity problems
- 3.7 Develops, creates, and maintains the library Web site

4 Collection Care and Management

- 4.1 Creates collection development policies that are appropriate to the overall mission of the parent organization
- 4.2 Makes selection decisions, in consideration of all relevant factors, including the library's collection development policy, differences among formats, and costs of purchase and upkeep
- 4.3 Evaluates information resources in all formats, integrates them to meet the needs of library clients, and discards or archives them as appropriate
- 4.4 Understands the acquisition and management of a diverse collection of legal and non-legal resources in multiple formats

- 4.5 Ensures the optimal arrangement of and access to the library's traditional and electronic resources
- 4.6 Improves the power and scope of library services by ensuring accessibility to outside collections and databases through resource sharing
- 4.7 Selects and implements an appropriate level of descriptive cataloging, classification, and subject analysis to meet the needs of the institution and the nature of its legal materials
- 4.8 Creates and selects catalog records according to national standards and accepted practices
- 4.9 Selects, implements, and continually improves an integrated library system appropriate to the needs of the institution
- 4.10 Applies appropriate preservation practices to the library's collection

5 Teaching

- 5.1 Determines the educational needs of clients through observation, discussion with clients and colleagues, and the use of needs assessment tools
- 5.2 Effectively teaches library clients with differing needs and technological skill levels
- 5.3 Knows and applies the principles of adult learning
- 5.4 Designs curricula and methods to meet the educational needs of clients and evaluates the educational process for effectiveness
- 5.5 Educates clients in the methodologies of legal research
- 5.6 Provides training and guidance on the organization and use of legal resources in various formats
- 5.7 Acts as liaison to outside providers of commercial research databases to coordinate instruction on the effective use of these tools
- 5.8 Promotes the effective use of new technologies for the retrieval of information
- 5.9 Prepares and packages materials such as bibliographies, pathfinders, training scripts and handouts, utilizing a variety of formats

Professional Development Mission Statement (working draft)

The AALL professional development program provides readily available, high quality and timely educational programs, publications, services, and other educational opportunities to AALL members, enabling them to meet (and exceed) the Competencies of Law Librarianship (www.aallnet.org/prodev/competencies.asp).

Professional Development Vision Statement (working draft)

The AALL professional development program meets the educational needs of AALL members through a variety of programs, publications, services and opportunities. Professional development programs and activities enable members to maintain and enhance their professional knowledge and skills, to maintain effectiveness in a constantly changing legal environment, and to meet (and exceed) the Competencies of Law Librarianship. The professional development program also explores collaborative educational endeavors with other not-for-profit and for-profit organizations, and ensures that educational needs of law librarians are met.

Evaluation Process Used by the Professional Development Committee

The Professional Development used the following evaluation process to accomplish its assigned ongoing and new responsibilities.

First, the Committee met November 16-17, 2001 to review the new direction presented to it by the Executive Board. At that meeting, the Committee held several “brainstorming” sessions to consider the mission and vision statements for the professional development program (drafted by Executive Board members); the May report; what constitutes success for a professional development program; what is an “ideal” professional development program; who the audience for professional development programs is and/or should be; what are the appropriate and most useful delivery mechanisms; and many other issues.

The Committee left its November, 2001 meeting with many questions and few conclusions. Some of the questions generated at the meeting are listed below.

1. Is there clear and convincing evidence that AALL members want the Association to develop and offer a comprehensive professional development program, or are the chapters meeting the needs of members?
2. What is the role of the Professional Development Committee within the Association (policy making group, programming committee, etc.)?
3. Are members looking for some type of certificate program from their participation in PDC activities?
4. Are AALL members the primary audience?
5. Is the mission of the PDC to meet the needs of AALL members? If so, is this being done?
6. How do the Competencies of Law Librarianship factor in the development of the Association’s professional education/development program?
7. How specialized is specialized in terms of programming?
8. How do you convey the message that there is education by osmosis (i.e., do members perceived the Desktop Learning series and the moderated Listserv discussions as professional development)?
9. What is the most effective way to educate members about professional education?
10. What is a successful program? What makes an ideal program?
11. How do you ensure quality?
12. How should the responsibilities for professional development be distributed between committee members and staff?
13. What should be done to employ a mixed focus on competencies and delivery mechanisms?
14. What are the various delivery mechanisms and which ones are the most effective, which delivery mechanism is the most appropriate for a particular subject or topic?
15. What are the issues associated with appropriate substance of a program (levels of programs; adult learning styles; competencies; interactive; practical and theoretical; immediate application; skill building; content and speaker are

- appropriate; timely; appropriate outcome measurements; quality handouts; formalized tracks or a structured curriculum; etc.)
16. Is it important to present programs to outside groups that take advantage of AALL members' expertise and what is the proper "branding" of these programs and AALL?
 17. What are the issues associated with the process (multiple delivery for those who cannot attend a face-to-face meeting; follow-up to ensure that competencies are being implemented; pre-assigned readings and materials; tangible certification/statement of completion; database of good programs; time issues such as the "cluster" model used by PLA; format fit the content; learning outcomes appropriate; marketing; coordination between speakers and planners; speaker coaching; etc.)

The second step in the evaluation process started with a meeting among PDC Chair Timothy Coggins, AALL Executive Director Roger Parent, Director of Programs Martha Brown, and Education Manager Mary Jawgiel in Chicago. During this meeting the group identified a process that included a series of Committee Listserv discussions about specific issues/topics. The Listserv discussions were then followed by monthly conference calls to address further the issues/topics of the Listserv discussions and to attempt to reach some Committee consensus about the issues/questions. Prior to each Listserv discussions Mary Jawgiel posted the relevant recommendations from the May report for each particular topic to the Committee. Prior to each conference call Mary prepared and distributed to the Committee members a summary of the comments made during the Listserv discussion. Following each conference call Mary Jawgiel prepared and distributed a summary of the conference call. (These documents are included as Appendix E. for Board members who wish to review the substance of the discussions.)

Listed below are the topics of the Listserv discussions and conference calls.

- Discussion #1: Role of the Professional Development Committee
- Discussion #2: Ad Hoc Program Planning vs. Establishing a Set Curriculum
- Discussion #3: Delivery Mechanisms and Models of Programs
- Discussion #4: AALL's Relationship with Chapters
- Discussion #5: Professional Development Mission and Vision Statements
(Discussion #5 was deferred to the Committee's meeting in Orlando.)

This process worked well and helped the Committee identify more precisely the issues that needed addressing in each area.

Finally, the Committee continued its discussions at its meetings on July 20, 2002 in Orlando at the 2002 Annual Meeting and on September 6-7, 2002 in Chicago.

Appendix E

PDC Listserv & Conference Call Discussions: Summaries

(The Committee has not restructured these comments and summaries in a more formal nature, but rather includes here these summaries and comments as used by the Committee, i.e., working documents.)

PDC Listserv #1: The Role of the PDC

Summary of Responses to Questions Posed

What are (or should be) the responsibilities of the Committee?

1. development of the Competencies of Law Librarianship shows the value of PDC and shows the type of responsibility a PDC-type entity is needed to address.
2. environmental scans of the membership and the profession
3. investigate, evaluate and implement some pilot distance learning type opportunities (West. Pilot project)
4. big picture, trends, and apply them to what they know and/or can find out about the membership
5. broad responsibilities to research the topics, formats, delivery mechanisms, target audiences, etc., that members would like to see. I would see the PDC reporting these findings to the Board for shaping the present and future direction of the educational programs, making a commitment to address the concerns raised by the members in surveys, business meetings, etc.
6. PDC should be working closely with the AMPC committee for each year's Annual Meeting program to ensure that the long term educational needs and topics that they have researched are considered for inclusion in that year's programs.
7. Oversight body for CE that evaluates and determines member needs. We should be seeing the big picture and staying in touch with members, articulating the needs of the people we deal with in leadership roles
8. core competencies, surveys of members' needs all contribute to this picture.
9. if a professional topic is not being addressed, and PDC thinks there is a need, PDC can either find an organization to partner with or ask a group to prepare a program
10. the eyes and ears of the AALL to see where there are areas which need to be addressed with programming. We should provide the historical record to the current AMPC re: the evaluation of speakers, topics, appropriate formats, etc.
11. proactive in finding out about interesting programs being held locally by chapters. Perhaps we should appoint PDC liaisons to the various SIS'es to report back the needs, concerns, issues re: continuing education.
12. another conduit of information to the program planning process -- to that end we should devise surveys, conduct focus groups and use any other means to communicate with the membership.
13. determine standards of what to offer and make sure program inclusive enough to cover all audiences – solicit member feedback and give guidelines to future AMPC.

Does it function at a “strategic” level only, or does it have responsibility for operational level programming as well?

1. assist with regional programming if there is a demand but we should not try to impose regional programming on chapters.
2. Desktop Learning Series and Listserv can be handled elsewhere, PDC could suggest topics but nothing more.
3. Since PDC doesn't actually do Desktop or Listserv but suggests topics and/or writers, moderators, PDC should keep.

4. PDC should continue to coordinate with the AMPC so that programming has more than a short term planning process.
5. PDC work with AMPC for each year's Annual Meeting program
6. Find organizations to partner with to cover all topics.
7. Bring Annual Meeting quality programs to other parts of the country

If it functions at the "operational" level as well, how can we accomplish this as a committee of volunteers?

No specific responses.

There are some within our organization who do not believe that the PDC HAS a role and that programming should be left to the Annual Meeting Program Committee, the chapters, and the SISs. Does the PDC even have a role within the organization?

1. Most believe yes – but not in its present form
2. Two Committee members feel PDC not needed (not the appropriate entity for workshops and regional programming) but an overall education committee that looks at the big picture is and one person leans in this direction
3. Perhaps PDC would not be a standing committee but PDC core activities could be managed through association task forces or special committees
4. Committees shouldn't be set in stone, and sometimes things need to be realigned

If it doesn't, who handles the "oversight"?

1. There appears to be consensus that some type of committee is needed and that this is not a Board function.

If it does have a role, what's the role?

2. a high level, policy group that considers educational issues for law librarians within a broader context than the Annual Meeting. Projects
3. operate as an oversight body for Continuing Education.
4. broad responsibilities to research the topics, formats, delivery mechanisms, target audiences, etc., that members would like to see. I would see the PDC reporting these findings to the Board for shaping the present and future direction of the educational programs, making a commitment to address the concerns raised by the members in surveys, business meetings, etc.
5. BIG PICTURE -- if PDC is or becomes a policy group, it has to be concerned with big picture and results over TIME. Strategic planning, core competencies, surveys of member needs
6. a more appropriate role is as an advisory group that monitors and helps shape educational policy and reports directly to the Board.
1. I believe that the PDC does have a role but it should be mostly limited to policy, planning and advisory -- looking at the overall educational programming to make sure that all bases are covered, providing new ideas and input where needed.

Who should be members of the PDC if it exists?

2. Creative with a variety of interests and concerns
3. Rotate among SISes for members

4. Need newer AALL members but also experienced members
5. Former SIS or Chapter Education Chairs
6. People who present or teach
7. Those with multiple SIS and Chapter membership

May recommends that the committee should be composed of “representatives from each major member constituency and “major planning groups.” What does that mean, and what size committee would result from that statement?

1. Not too big or too small
2. Can’t have a Committee of 13
3. All SIS groups would be too big – Rotate through SISes – need AMPC representative and a Board liaison

Where does the role of the PDC members end and the role of the AALL staff begin?

Staff could:

1. PDC would do environment scan and use staff to gather other information that would be useful in conducting/reporting
2. Staff could do all things listed in Role of PDC except long range planning, needs assessment and educational standards – staff could get involved in needs assessment through the ‘grid’ noted by May.
3. Background research on topics and/or trends in educational programming.
4. Anyone can suggest a program, speaker, delivery mechanism, etc.
5. Management of educational efforts and logistics
6. There needs to be a relationship between HQ, AMPC and PDC so all know what the other is doing.
7. PDC advise – staff execute

How should educational programming be “divided up” among volunteers and staff?

No specific response.

What oversight responsibilities does the PDC have if it is policy committee only?

1. Establish the big picture through educational standards
2. Assure that Annual Meeting programming addresses educational standards

Listserv #1 - Role of the PDC

Conference Call – Thursday, March 28, 2002

Summary of Discussion

Conference Call Participants: Tim Coggins, Chair; Anne Matthewman, Board Liaison; Darcy Kirk, Richard Jost, Jill Sidford, Kathie Sullivan, Committee Members; Martha Brown, Staff Liaison; Mary Jawgiel, Staff.

Here are the issues that were raised in the discussion:

What are (or should be) the responsibilities of the PDC within AALL?

1. Serve as big picture group for education

2. Environmental scans of the membership and profession
1. Development and review of the Competencies of Law Librarianship
2. Research topics, formats, delivery mechanisms, target audiences, etc.
3. Identification of member educational needs and recommendations on how to address these needs
4. Serve as liaison with SISes and Chapters about professional development issues, but recognize that some chapters do programming very well
5. Continue as coordinating group for the Desktop Learning series and the Listserv discussions
6. Make certain there is a balance, a diversity of offerings for members
7. Be proactive in dealing with various groups, such as AMPC, chapters, SISes, etc.

Does the PDC have a continuing role within AALL?

- 1 Those on the conference call believe yes
 - a. In depth analysis of Annual Meeting evaluations with suggestions from PDC back to next AMPC – distill themes that show up on the evaluations, common issues of concern, things handled well, etc.
 - b. Functions as a high level, policy group considering the educational issues
 - c. Assures quality of all activities, including Desk Top Learning and Moderated Listserv Discussions – suggests topics and authors/moderators
 - d. Individual Committee members serve as liaisons to SISes and Chapters
 - e. Review relevancy of Competencies of Law Librarianship on a regular schedule
 - f. If Committee does not have “tangible things” to do, what does it do?
 - g. Committee has a role, but perhaps not with its existing responsibilities
 - h. If Committee duties are handled by a periodic task force, then do you experience too much going over the same issues, rather than having a group charged with looking at these issues on a regular basis?

If the PDC should exist, who should be the members of the PDC?

- 2 Creative with a variety of interests and concerns
- 3 Balance of new and experienced – although might be tipped in direction of more senior members
- 4 Individuals with background in Chapter and SIS membership
- 5 Do not try too hard to “compose” the committee; if core group not represented, fix this.

Where does the role of the volunteers end and the role of the AALL staff begin?

Staff might serve a more direct role in the “handholding” for authors of Desktop Learning Series articles and for moderated Listserv discussions. The Committee felt that more on this would surface through other scheduled Listserv discussions.

Other issues related to the role of the PDC

There was discussion on developing a conflict of interest statement for the committee and/or request that publisher/vendor members not be appointed to this committee.

PDC Listserv #2: Program Development: Ad Hoc Planning vs. a Developed, Set Curriculum
 Summary of Responses to Questions Posed

Defining ‘curriculum’

1. A curriculum could be defined as a series of programs or opportunities that provide a path to achieve the Core and/or other specialized competencies.
2. Key issue would be to determine most effective delivery method for the content.
3. Committee could determine which of the Core competencies could/should be achieved through MLS and/or experience and then work with SISs to develop ways to address specialized competencies at a particular level of competency (i.e. basic, intermediate, advanced, etc.)

In terms of addressing and meeting members' professional education needs, what do you think are the advantages of a developed, set curriculum?

1. more easily able to identify whether or not you have developed a program that addresses the competencies, the needs of the members, both experienced and new;
 2. helps librarians and their institutions do better planning, both individual librarian needs and budgets to support continuing education;
 3. enables an individual librarian to plan better professional development for himself or herself;
 4. committee/staff not constantly in the process of developing new programs and opportunities.
 5. I like the model that we are using for the cataloging institutes; an introductory session, followed by an intermediate and advanced session, spaced out over a set period of years. This gives some predictability to the membership that they can take the series as a complete track or they can choose to attend only one session.
 6. This approach lends itself well to topics where we know there are ongoing changes (cataloging electronic resources, for example) but where there is also a basic core of knowledge (interpreting MARC records, for example) that every cataloger needs to know. We can vary the intermediate and advanced topics as needed to incorporate "hot topics" while still covering the basics.
 7. with a workshop or institute, offered with reasonable consistency, we have the opportunity to brand a topic as an AALL product. So, I wonder if name recognition isn't a possible benefit to AALL offering some set curriculum.
1. there are probably some people who get comfortable with a speaker and enjoy hearing them more than once because they know that the content and presentation will be good.

What are the disadvantages of a developed, set curriculum?

2. Could become stale; little new presented, so members look at it as not timely, not up-to-date
3. Not able to address cutting edge, new issues
4. Could a structured program be designed to take advantage of new and outstanding presenters; would you lose vitality, energy, etc. if various programs used same speakers over and over
5. most libraries would probably want a shorter time frame, for basic, intermediate and advanced courses (perhaps by looking at different delivery formats, they could be offered in more rapid succession)

6. what happens when you get a new cataloger and the next time cataloging comes up is a couple of years away?
7. there should be a way to encourage the participation of new presenters - people might think they'd hear the same thing if they went to hear the same speaker multiple times.
8. we need to create more experts in various fields.

Comments on how to keep set program “fresh”.

1. Review content say, 6 months before program date and update with any new information, issues, etc.
2. Rather than contracting for speakers years in advance, develop a pool from which to find a speaker and make choices based on availability and prior evaluations, say 5 or 6 months in advance.
3. Allow time (say an hour) in each program that could be used for updates.
4. Set up a follow-up program for up to one year after the presentation to send "news" to those who attended.
5. Use delivery mechanisms besides f2f, (desktop learning series, moderated listservs, program or workshop at an Annual Meeting, a discussion group at the Annual Meeting, an audio/web program, preparation of outlines for discussion to be sent to Chapters for their use, etc.) that could provide follow up and convey new techniques or issues.
 1. require that instructors update content before each program is given
 2. use sunset clauses in agreements with instructors
 3. be vigilant in making sure that the syllabus is kept up to date with current information, and that we encourage a variety of speakers.
 4. Rotating the delivery mechanisms and formats of these programs would be another way of making sure that they reach a wide audience.

Comments on a ‘semi-structured’ environment:

Those responding favor a combination of a set curriculum with some hot topics interspersed where needed – a semi-structured environment.

1. I like the idea of a semi - structured environment for our educational programs that leaves us the maximum flexibility to adapt to new situations. I think that a combination of approaches could fit together rather well and allow us to bring a wide offering of programs to the membership.
2. I believe that the educational offerings of the AALL need to be a mix of structured curriculum and non-structured curriculum.
 1. In the past few years program slots have been carved out of the annual program schedule to accommodate "hot topics" I believe that this same principal should be incorporated in to educational offerings no matter the forum or the mode of disseminating the educational opportunity.
 2. I see this a bit broader than what the term "hot topic" might connote these programs would include but not be limited to - special needs of SIS'es, committees, members who submitted a terrific program that would not fall under the umbrella of the structured program, cutting edge programs, etc.
 3. Workshops & Institutes: I would like to see the same process implemented

for the Workshops and the Institutes, in a way this is easier because we already have a pretty good idea of Institutes and Workshops that need to be presented on a regular schedule. We are already accommodating ad hoc workshops and in the past some Institutes were more ad hoc in nature by which I mean they were unique, they were not offered again but they were produced to fulfill a special need.

4. if we limit our programming to a completely structured curriculum we will not need to worry about it being stale it will stagnate. I do not think we need to worry about speakers or program materials for the ad hoc programming -- as the need for this programming arises -- so will the identities of the speakers, their materials, etc.
5. it may be more challenging for the program planners of this type of program but approval of this type of program will be partially dependent upon members who can deliver a quality program. Ad hoc programming will breathe life into the entire enterprise and insure freshness of presenters as well as presentation.

Ad hoc planning offers the committee and AALL some advantages such as responding to hot topics, new developing issues, etc. What are the advantages of "ad hoc planning" to meet the professional development and education needs of AALL members?

1. I think that we need to leave a certain amount of time and energy to focus on new topics as they arise, as I suspect that they will be of great interest to the membership
2. opening this topic selection up to the special needs identified by the SIS's, who may have a very exciting topic that may not find a slot in a more structured environment.
3. the KRM delivery format could be a good way to address hot topics.
4. I feel we need to build into the process some fast track method of expediting the approval of good programs [criteria for "good" to be determined].
5. Eliminate bureaucracy and the perception of bureaucracy

What are the disadvantages?

1. if you do ad hoc planning, that presents problems of finding experts/speakers on a short time line.
2. And, how timely is timely? What's hot today might not be by the time you get it together. This might be an area for list-serv discussions, too.
3. sometimes a "hot topic" becomes a "cold topic" by the time an actual program or workshop is pulled together to address it -- it may be that we do less advance planning for these and try to prepare them as close as possible to the date when they are to be offered.

If ad hoc planning is a good thing, how do you get the program through necessary reviews in a timely fashion?

4. I am not sure I know or understand the current process of "necessary reviews" -- I think I understand what AMPC does and I believe I understand how PDC also reviewed Workshop selections [duplication of effort?]
5. I must admit that I am not up to speed on the current process and I have nil understanding of the RFP process that is currently in use. I do feel that we need to build in to

6. I just reviewed our agenda for our 2003 report to the Board --will the "necessary reviews" including the RFP process be covered in Discussion #3?

Can we guarantee a well-developed quality program?

No comments addressing this question.

How about handouts – do we lose anything in quality and comprehensiveness if a developer has to develop them in a short time period?

No comments addressing this question.

Think about our charge (the revised one): “Given that the current Professional Development Program is financially unfeasible the Executive Board directs the Professional Development Committee to design new professional education program alternatives which are financially sound.”

1. The KRM report...prices programs at slightly over \$200. And we have a desire to be more timely in being able to grab hot ideas and get a program out.
2. My concern with all of our innovative ideas is this: how do these initiatives fit into budget requirements? We have requirements to recover costs plus indirect costs, among other parameters. The reason I would like to explore alternative delivery methods is to reduce costs, thus increasing attendance. Or at least that's out it seems it could work. But if we are stymied by the "usual" budget guidelines, we'll be pricing web, phone, online, etc programs AS IF THEY were a sited, in person program. How can we resolve this apparent conflict?

Other questions arising from conversation:

1. what big topics or categories, such as "family law" or "bankruptcy" we could offer that we could update on an annual basis that would not overlap with other organizations and that would appeal to a large audience. Law Library management? Legal Research?
2. we have presenters who seem to crop up too frequently at AALL educational programs. Currently is any data being kept where we could quickly identify the over-exposed? If not, is this a project for the PDC?

Listserv Discussion #2: Program Development: Ad Hoc Planning vs. a Developed, Set Curriculum

Conference Call – Thursday, April 18, 2002

Summary of Discussion

Conference call participants: Timothy Coggins, Chair; Anne Matthewman, Board Liaison; Darcy Kirk, Richard Jost, Lori Hedstrom, Cathy Lemann, and Kathie Sullivan – Committee members; Martha Brown, Staff Liaison.

Following are the issues that were raised during the discussion:

Definition of curriculum

- series of programs such as the cataloging one as a model
- good program probably includes some set curriculum and some of the “ad hoc” nature
- could have a planned workshop in July for example followed up with a Listserv discussion in February as an update, new developments, etc.
- good thing to include in the curriculum things that keep coming up - needs to be part of the program.
- Legal Reference is the type of program that should be offered frequently.
- financial implications, pricing of the workshops, etc. all have to be considered.
- quality is very important
- look to sources such as LLRX for ideas (a “seed”), individuals/experts, etc.
- talking about all different types of delivery, not just face-to-face.
- opportunity for those who do not or cannot attend the Annual Meeting to get involved in both attending and presenting.

Importance of sequencing

- building block aspect of programming in a sequence is important.
- helps with the branding issue as well if a series from beginning to advanced is available to members.
- series could incorporate different types of delivery methods.
- what happens when you having new cataloger for example beginning but the series of cataloging workshops is at the intermediate level? Perhaps, offer basic every year. Is there a market for that?
- advantage of regularly offering a program and sequencing is that libraries can then build the registration costs of these programs that they know will occur into their budgets.

“Hot” and “emerging” topics

- good way to get the SISs involved; they should know what the emerging issues are
- handle through multiple avenues, such as a Listserv discussion first, followed by a webcast of a program developed from ideas raised in the Listserv discussion, etc.

Involvement of the SIS and Chapter members

- involve them in identifying member needs and emerging issues
- think about other partnerships as well such as working with public libraries and other associations for programs on how to do legal research for example
- look to SIS members to help with program development

Funding/budget issues

- must consider this 4-6 months ahead of time of face-to-face program for issues such as planning and organizing content, prep. time for instructor, publicity, siting the program, etc.

- consider different types of delivery; alternative technology, etc.
- have to consider pricing of opportunities

RFP process

- time issues associated with the RFP process
- history of why the RFP process was created (fairness; quality review; consistency; educational principles; offer chance to members to participate in the process; etc.)
- proposers are required to update their materials
- RFP process is daunting
- importance of PDC continuing to provide some guidance about what we believe that members need
- approach some members/others to present opportunity

Other issue/question:

- Is there a way that we can get access to where SLA and ALA members are located to see if there is an additional market, other than only law librarians, for AALL programs in certain areas? But have to remember that members are our priority.

PDC Listerv #3: Programming Specifics (Models of programs, delivery mechanisms, pricing, etc.)

Summary of Responses to Questions Posed

We've discussed various types of delivery for programs such as face-to-face, video conferencing, printed materials such as articles and workbooks, webcast, etc. What do you think are the most positive aspects of each type? What are the disadvantages of each?

Satellite delivery – Advantages

1. Great when need full, robust (“broadcast quality”) video
2. Very good sound

Disadvantages

1. Weather can be an issue regarding transmission quality
2. Registrants must come together at a downlink
3. If on site facilitator isn't ‘good’ there is no interaction
4. It is a major production that requires experts on the technical side
5. Very costly
6. Program is at specific day and time – would need to purchase if unavailable then
7. Not all places have the right equipment.

Video streaming over web – Advantages

1. Convenient and less costly for the participant

Disadvantages

2. Requires proper equipment (multi-media PC) and reasonable bandwidth for participant
3. Video picture can be small and jerky;

4. Very costly, but drops in cost as more sites subscribe

Telephone seminars – Advantages

1. Convenient, anywhere technology and easy to use
2. Cost effective;
3. Best for lecture format
4. Easily interactive with faculty and registrants (like a talk-radio program)

Disadvantages

1. Audio only – no visuals
2. Participant must be available on day and time of program

Virtual seminars – telephone with web – Advantages

3. Convenient, no need to travel;
4. Low technology requirements for PC (no sound card or speakers needed) and Internet connection (56kb)
5. Internet visuals do not include video streaming (limited to PowerPoint type slides, Web tours, white board, polling; questions from audience; application showing);
6. Interactive

Disadvantages

1. May be costly to participants
2. Participant must be available on day and time of program

CD ROM – Advantages

3. Can be stored on the Web with most of these formats, but need to factor in hosting costs;
4. Navigation tools are good in the more expensive models;
5. Easy to create if just capturing lecture and slides

Disadvantages

6. Must focus on how to sell these long-term
7. Difficult to update with new content.

Audio CD/Cassette – Advantages:

1. Portable
2. Not linear so that listener can jump to what they want to hear
3. Inexpensive for participant and supplier

Disadvantages

1. Difficult to update with new content
2. Real challenge is to find a way to create tracks and an index

Face to Face – Advantages

6. More interactive and 'cutting-edge' because people can ask questions and follow up.
7. There is something about making an effort to go somewhere for a program that tells yourself that you have set aside this time specifically for learning

Disadvantages

8. May be difficult GETTING TO the site: travel, possibly hotel costs.

9 Participant must be available on day and time of program

Web only – Advantages

- 10 No travel costs
- 11 Can be interactive, depending on format
- 12 Can be done when registrant has time

Disadvantages

- 13 Sitting at my desk and trying to do a web program is subject to many interruptions!
- 14 There's always more than one way to do something (use the dropdown menus to copy and paste or the keyboard, for example) and if you didn't choose the method they wanted it was wrong.

What should be in the cost (if any) to register for the various types of programming?

- 15 If the industry standards are \$239 and \$149 for various types of programs, we are going to be out of the market if we price higher.
- 16 In short, with such a high markup (78%) for PDC, and a pretty high expectation for the annual meeting, we're going to see fewer and fewer attendees.
- 17 we may be guaranteeing failure or guaranteeing that we are unable to present a good program under our aegis because of the overhead our aegis brings
- 18 Each individual program has its own budget that conforms to the guidelines. All direct expenses are totaled and then a predetermined percentage (including overhead, ½ salary and benefits for the education manager, one PDC meeting and known marketing/promotion expenses) is applied to the total direct expenses. The percentage figure for 2001-02 is 78.73%.
- 19 Part of the problem is the fundamental problem that we have of valuing ourselves and making our supervising/money people recognize that.
- 20 If one of the primary missions of AALL is to provide education to our members, than all of us have to pay for that. I don't think it has to be up to the individual attendee to shoulder the entire burden of making a program break even.
- 21 the article on online education courses is very interesting re: costs. To do it well, it is very expensive. And that the successful program in Phoenix resulted from "expertise in branding, marketing and infrastructure
- 22 I think we need to start small and cheap with online courses, but we should definitely give them a try
- 23 Pricing for the PDC programs has always been difficult and is a constant source of complaints for our members. We need to stop saying that people pay for SLA or other programs that are more expensive as a justification for the cost of our programs.
- 24 Another point on pricing is that we have to make sure that PDC programs have a high quality reputation -- that our brand stands for quality programs on relevant topics. People are willing, I think, to pay for programs in a variety of formats if they have some confidence that what they are paying for will be worthwhile. Our struggle with whatever type of delivery mechanism we choose is to make sure that we can deliver the same high quality in all formats.

Do attendees really learn as much for a "non face-to-face" workshop as they do when they sit in front of someone, hear what they say, can ask questions actively, can participate in live exercises, etc.? How do you judge this?

1. FTF has an advantage that if the presenter sees me falling asleep, s/he can try to adjust to keep me awake. That's a disadvantage with videoconferencing or webcast. Where the audience is dispersed and the presenter can't make eye contact, it's potentially more soporific.
2. My general impression is that if people are going to hear a speaker or attend a workshop, the expectation is that it will cost more because it is "live". Exactly what it should cost is hard to say, because it depends on the reputation of the speaker, the place, the handouts, etc. and I am not sure how to break that out. On the other side, I think that if I were attending a video conference, having online training or some other "non-live" experience, I would expect it to cost less because it does not have the same immediacy for me. Also, I think that there is a widely held belief (not necessarily true) that the costs of technology are not that great so it should be less expensive to supply a program in this fashion instead of having a speaker.

Other Comments

3. My sense is that people do like a variety of options, but the cost for the non-FTF options are still so high that even if the actual content is good, they feel like "Why am I paying \$250 to sit in my office and watch somebody's PowerPoint when I can go somewhere and listen to someone in person?" Even when funding is tight, the PERCEIVED value of FTF is greater.
4. At the very least, I would like to see us offer educational opportunities from other organizations that may be of interest to our members. For example, many law schools are offering web casting (or streaming video) of major talks, maybe we could make these available to our members as well.
5. I think that meeting formats need to be an issue of continuing study for the PDC [if the PDC continues to exist]. Studying formats and delivery mechanisms and how a particular format and delivery method accommodates certain types of learning for our membership seems to be the exact type of work that this committee should be doing.
6. I agree with the majority of those who have responded that we need a wide variety of delivery mechanisms to meet people's different learning styles.
7. I agree that written documentation whether in a Spectrum article or handouts from an educational program is also vital for most of us.
8. It would be nice to be able to offer a mix of mediums to our members and let them pick what is best for them. However, we know that we cannot afford to support all methods
9. ARL continues to do fabulous programs on library management. They are not cheap, are offered at different locations around the country, but are very popular. I routinely send rising managers in my library to those sessions.

PDC Listserv Discussion #3: Programming Specifics (Models of programs, delivery mechanisms, pricing, etc.)

Conference Call – Thursday, May 16, 2002

Summary of Discussion

Conference Call Participants: Tim Coggins, Chair; Lori Hedstrom, Richard Jost, Darcy Kirk, Cathy Lemann, Kathie Sullivan, Committee Members; Martha Brown, Staff Liaison; Mary Jawgiel, Staff

Here are some of the issues that were raised in the discussion:

What are some of the advantages and disadvantages of various delivery mechanisms?

The recap of the Committee's Listserv discussion included a listing of the various delivery mechanisms for educational programming. The following are additions to that listing that were mentioned in the conference call:

Satellite delivery – advantage – per person cost can be very low depending on the number of sites and number of participants at each site; up front costs are high, but there is potential to reach a huge audience.

Virtual seminars – telephone with web - it was noted that this is the KRM format

Web only – its was noted that web only courses could be either asynchronous (any time – any place such as posting to a discussion board) or synchronous (same time – same place such as all participants coming to a chat room at the same time).

The Committee will be trying both virtual seminars, possibly through KRM and web only courses through an agreement with WestLegalEdCenter to their delivery methods later this year.

There was discussion on how to deal with interruptions for office-based learning. It was suggested that it might be best if offered at a specific time and perhaps scheduled for a computer room where a larger number could participate. Many felt that it was too easy to be distracted by other daily activities. There also is a concern about the use of computer-based learning and telephone seminars for some employees who work in large, open spaces with other employees.

Other Association/Groups' Programs as Part of the Package:

Advantages – Offers AALL members greater number of programming alternatives if AALL promotes these or co-sponsors with another group.

Little, if any expense to AALL. AALL would not need to develop content, materials, find speakers, etc.

Disadvantages – Programs not necessarily law librarian specific.

Major benefit of association membership is providing profession specific educational opportunities for members. Not doing so could cause decline in membership.

Pricing of AALL Programs

Board Established Guidelines

Each individual program has its own budget that conforms to the guidelines. All direct expenses are totaled and then a predetermined percentage (including overhead, ½ salary and

benefits for the education manager, one PDC meeting and known marketing/promotion expenses) is applied to the total direct expenses. The percentage figure for 2001-02 is 78.73%.

Factors to Consider: Content, Quality, Competitiveness, Value to Members, Other

1. The Committee discussed the current guidelines and some members felt that if one of the primary missions of AALL is to provide education to our members, then all of us need to pay for this – the individual attendee should not have to shoulder the entire burden of making a program break even. If AALL believes that one of its goals is education, then it (and its members) should be willing to fund it. There should be some way to perpetuate the program as well. Why isn't there a budget line for the PDC program like there is for the Annual Meeting?
2. There was also discussion on how the Annual Meeting budget is done and its similarities/differences to the PD budget. There is need for clarification on this.
3. A suggestion of balancing the cost of the entire PD program over the entire curriculum (rather than on each individual program) was made.
4. The idea of establishing a schedule years in advance with the topic and the location was discussed.
5. Taking Annual Meeting workshops and presenting them at different places around the country was mentioned. Videotaping workshops at the Annual meeting and then offering those to the chapters was also mentioned. However, very few organizations try to sell videotapes. Industry studies indicate that they do not normally sell.
6. There was some discussion about the “blended learning” theory and whether or not AALL was trying to do too much by offering programming opportunities in many different delivery mechanisms. Many felt that it was important to offer programming through different delivery mechanisms.
7. There was some discussion about the article that Jill distributed. The article states that many organizations are outsourcing training and professional development. Some had read other articles that indicate the opposite.
8. There was also some discussion about whether or not creating a “full year of programming” was necessary, or whether AALL should concentrate on programming opportunities at the Annual meeting, workshops at the Annual Meeting and then a series of face-to-face workshops offered on a regular schedule at times other than the Annual Meeting.

Marketing/Packaging/Branding

Various comments were made about the importance of AALL having its own (“branded”) program for professional development and members and others clearly associating AALL with a Professional Development Program.

PD Listserv #4 : Relationship/Coordination with Chapters (and SISs)

Summary of Responses to Questions Posed

How does AALL create a "national" professional development program that incorporates regional offerings but avoid conflicts with chapters and the programming that chapters do? Or put more positively, how can we best put together a program that enhances what the chapters already do?

1. Central challenge facing our committee as noted by at least three members is how to serve (at least) two widely divergent sets of Chapters well and at a reasonable cost -- those large, geographically centralized chapters around big cities that probably already have a lot of membership participation and locally organized programming of high quality and those smaller and/or geographically far-flung chapters that may have low participation and lack resources to pay for "outside" programming.
2. This is where our "variety of formats" strategy comes most strongly into play, and should be marketed as such, but I am concerned about creating a two-tiered system of programming where the people who already have a lot get more and those who need it more will perceive themselves to be further left out.
3. SOLINET will occasionally hire an "expert" in an area to develop a workshop. SOLINET then owns the content, and offers the workshop with its own trainer or a person that SOLINET picks in the region where the workshop will be held. Could we develop all the content for a program about "Bridging the Gap" and then market it as a canned report for a chapter, a law school library, etc. to "buy" and then the purchaser would use its own teachers? This idea received support from some PDC members.

Other Comment:

1. In addition, if a PDC program were sited, there should be encouragement to have chapters work together to sponsor it. Costs would be shared, attendance could be higher. It's the same principle with a regional conference of many chapters. There is a reason it has worked in the past with several regions: costs are shared among many, attendance is high, it's big and small at the same time and allows for good networking. Also, with mini-regional or joint chapter efforts, there is greater option for publicity to other organizations depending on topics. All chapters don't think about marketing to the public, medical, special folks...and in some cases (esp a regional chapter), even those outside numbers could be small.

If you have talked already with some of your chapter leader contacts, what are some issues raised by the chapter leaders?

2. Apathy is a huge problem, and lack of time. It's very discouraging to create programs for the group and potentially embarrassing when attendance is small.
3. Perhaps there could be a PDC article regularly in the Chapter Leadership bulletin. It could highlight successful programs or other activities.
4. COST of PDC programs: One chapter never charges for programs; one never charges more than \$20; one chapter is willing to bring a workshop and would subsidize the cost for its members -- most of its day-long programs now are \$95 -- \$120. (They feel that the time and hassle savings to the chapter of providing the program, speakers, etc. would be worth the additional cost -- but they are

not willing to pass that cost on to the members.); pricing of workshops still affects whether or not the chapter is willing to work with AALL to bring a workshop to the chapter. She suggests collaboration and a sharing of duties. Her chapter, she says, would be happy to perform some of the duties associated with a workshop if it meant a lower registration fee.

1. I think the chapters enjoy doing their own thing. But, they are definitely interested in help, suggestions or advice in doing their programming. I believe that they could benefit from us being a central store of topic ideas. Perhaps we could get the chapters to routinely send us a list of their program topics/plans; to facilitate or be involved with more "information sharing" of what the chapters are doing. The chapters have the Chapter Leadership Bulletin but if their apathy takes over, they don't report on their local activities to anyone. This idea supported by three committee members.
2. I think we should be looking at grabbing some of the best programs from the Annual Meeting and siting them regionally, getting several chapters to help out, and doing this midwinter time.
3. Also a problem, esp with regional chapters, is the lack of BIG firms (for example), so often there is just one librarian and that person often does not have the "luxury" of being able to attend professional activities outside of the local area. So cost is an issue as well as location.

Did your chapter contacts mention any topics for programming?

1. One chapter was indeed interested in adult learning. There is also a concern about program topics appealing to all levels -- older and newer law librarians.
2. There was also a question about whether the PDC could be the umbrella/oversight for "bridge the gap" programs and/or legal research programs. That is -- they would need to do the program, but could we provide them with all the materials??
3. Training relating to job specific tasks/duties is done well by chapter. What's missing are the "softer" issues such as teaching people about adult learning styles and how this affects the instruction that we all do, management-related issues, etc." There is some agreement among committee members on this.

PDC Listserv #4: Relationship/Coordination with Chapters (and SISs)

Conference Call -- Thursday, June 20, 2002

Summary of Discussion

Conference Call Participants: Tim Coggins, Chair; Anne Matthewman, Board Liaison; Sharon Blackburn, Lori Hedstrom, Darcy Kirk, Richard Jost, Jill Sidford, Kathie Sullivan, Committee Members; Mary Jawgiel, Staff.

Our chapter calls - what we learned, what some suggestions were, etc

1. Chapters seem pretty happy doing their own thing
2. Issues where they may need help include finding a place to hold; keeping cost to their members as low as possible; geographic distribution of members; finding speakers and topics

3. Hold only face-to-face programs (full day, lunch only, dinner, half-day, institutes, some partner with other chapters) as their members value the social and networking aspects of educational programming
4. The amount and quality of the educational programming depends on the chapter's leadership – sometimes more programs, sometimes less
5. Chapters don't seem to be opposed to hosting PDC programs but have an issue with the cost – would be willing to do local arrangements and/or subsidize food to bring down the price
6. Most use vendor or chapter funds to subsidize costs and keep registration fees low

What types of programming that might appeal to chapter members

1. PDC develop total program – handouts, learning outcomes, content, etc and provide to chapter – chapter could get local person to do – there could be different levels of AALL involvement, including providing speaker – could charge chapters for program based on level of AALL involvement
2. PDC could provide supplemental/complementary programming in non face-to-face formats

What topics for programming development might be appealing to chapter members?

No discussion on this.

How to get chapters excited, interested, etc. about the possibility of hosting a face-to- face program or some other type of format.

No discussion on this.

How to overcome issues such as cost.

No discussion on this.

Listserv discussion #5: Vision and Mission Statement:

1. Committee decided that discussion on this would take place during their Committee meeting in Orlando on July 20th