

Final Report
Evaluation of AALL Professional Development Program

June 2001

Sara Cameron May, M.S.Ed., Ed.D
Educational Project Consultant

Table of Contents

Executive Summary	3
Summary of Recommendations	5
Introduction.....	12
Background and Overview	12
Organization of Report	12
Methodology	12
Evaluation of Professional Development Committee Responsibilities, Roles and Processes	15
Professional Development Committee Responsibilities.....	15
Professional Development Committee Roles	21
Professional Development Committee Processes.....	23
Assessment of Programs and Products that Comprise the Professional Development Curriculum	28
Evaluation of Current Programs and Products and Suggestions For Future Activities	28
Business Issues Related to Professional Development Activities and Collaborative Efforts with AALL Chapters.....	36
Business Issues Related to Professional Development Activities	36
Collaborative Efforts with AALL Chapters.....	39
Assessment of Program Planning Processes by Accreditation Standards.....	43
Appendix.....	57

Executive Summary

In 1996, the Professional Development Committee of the American Association of Law Libraries was formed to oversee the professional development and educational activities of the association. When the committee was formed, the leadership felt that it was important to evaluate the committee's process and work products and programs after three years of operation. This evaluation investigated the work of the Professional Development program at the strategic level, and resulted in recommendations in the areas of:

1. Professional Development Committee process, eg, roles and responsibilities including the processes used to design and implement professional development activities.
2. AALL Professional Development curriculum, ie, activities in total, including their relation to Core Competencies and individual Professional Development programs and products. Recommendations address methods for identification of program topics that meet the learning needs of members, use of appropriate delivery systems, assessment of member learning preferences and needs, and business models for producing professional development activities.
3. Collaboration with Chapters and allied for-profit and not-for-profit organizations.

The primary methods of data collection were telephone and personal interviews and analysis of documents related to professional development activities. In-person interviews were held with staff; semi-structured telephone interviews were held with a total of fifteen volunteers who were current or past members of the Professional Development Committee, Chapter Presidents, or members of the Executive Board. A comparative analysis of the educational offerings of fourteen related or comparable associations and professional development providers was conducted through a web search and follow-up telephone interviews with staff in these organizations. The evaluation of professional development processes and activities was based on standard continuing education provider accreditation standards and recent research in association education that has established "Best Practices" in producing association education.

Based on accreditation standards, the AALL Programs unit is a well-run unit of the association. Educational planning processes are thoughtful and well documented. The organization enjoys an exceptional reputation in the association community and is recognized for the professionalism of staff. AALL should maintain the present level of activity in technical areas of planning and delivery of the professional development programs and products with the exception of needs assessment and instructional design. Staff and volunteers should significantly increase their efforts to understand their members through formal and ongoing needs assessment and through enhanced program evaluations. Staff should take a more active role in the instructional design and delivery of programming including faculty support and course materials design.

Recommendations to enhance current programming include minor modifications to the Annual Meeting and an increased number of professional development articles in *Spectrum*. Regional workshops should be redesigned to improve quality. New initiatives

to be investigated include telephone-web seminars, regional conferences and special interest group retreats.

The evaluation results recommend that AALL strengthen and formalize a Chapter Relations program with components to support Chapter education, newsletters and Web sites. AALL leadership is also encouraged to create a Professional Development Mission statement that clearly articulates all major aspects of the professional development program and ways in which the results will be measured. The report recommends that the Professional Development Committee be reorganized to function as a policy or advisory level group with staff taking responsibility for all technical education tasks.

Summary of Recommendations

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.

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.

Recommendation 3: Designate the *majority* of current members as the primary AALL audience.

Recommendation 4: Designate those who are Chapter members but not national members as the secondary audience.

Recommendation 5: Target non-members for appropriate programs and products that have been primarily created for members as the third ranked audience.

Recommendation 6: Only if the needs of the primary and secondary audiences are fully served, appropriate non-members can be targeted to expand the reach of specific programs and products as a device to make money and/or extend visibility into the community.

Recommendation 7: Emphasize the importance of helping members to stay current in terms of professional knowledge using the most appropriate and effective delivery system. Relegate the use of multiple and diverse delivery systems to a means to achieve the end.

Recommendation 8: After designing a professional development curriculum (set of activities) that is clearly produced and marketed by AALL as a major member benefit specifically tailored to meet member preferences and needs, determine which, if any, of these activities could or should be produced in collaboration with allied or other organizations.

Recommendation 9: Establish a Chapter Relations program to support high quality professional development opportunities at the local level.

Recommendation 10: Reorganize the Professional Development Committee as a policy level board that is composed of representatives from each major member constituency and major planning groups.

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.

Recommendation 12: Long range planning should be joint functions of staff and PDC.

Recommendation 13: Staff should take responsibility for all technical education areas (“means”). This includes, but is not limited to, needs assessment, evaluation, communications/marketing, identifying program topics and presenters, and program design, planning and implementation.

Recommendation 14: Staff should be empowered to create ad hoc committees of volunteer subject matter experts as needed to perform specific tasks and activities.

Recommendation 15: Staff should establish and manage collaborative arrangements with Chapters and other organizations as they relate to program design and management.

Recommendation 16: Establish an orientation and training program for the Professional Development Committee to help them function in their assigned roles. This program might be similar to annual Executive Board governance training programs described by staff.

Recommendation 17: Do away with the RFP in favor of a simple mechanism whereby the Director of Programs determines the viability of an idea for a program and takes expedient steps to contract with a presenter.

Recommendation 18: Maintain two professional educator positions at AALL to administer professional development activities. Determine and clearly articulate the terms of employment of the Education Manager position.

Recommendation 19: As the Education Manager and/or Director of Programs increase their level of technical education activities to design and produce professional development activities, any meeting planning responsibilities should be passed to the staff Meeting Planner, freeing the educators with formal training in Adult Education to use their unique skill sets to better advantage.

Recommendation 20: Create a Professional Development staff team that is responsible to the Executive Director to carry out the Professional Development Mission. Permanent members of this team should include the Director of Programs, the Director of Publications, the Education Manager and the staff member who manages Web content. Periodically and as needed, the Director or Finance or staff member(s) charged with responsibility for funding, the Meeting Coordinator, the marketing consultant and the person in charge of Web technical services should join the team.

Recommendation 21: Integrate publications that deal with professional development into the professional development activities.

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

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

Recommendation 24: Select Regional workshops that are based on the three (or four, if manageable) best one-day, one-speaker, regional workshops to present as soon as possible. Design or redesign, as needed, to ensure the highest quality standards, and market them heavily to the membership and Chapters.

Recommendation 25: Investigate the feasibility of regional, multi-Chapter conferences. Staff should take the lead in organizing, designing and implementing these conferences.

Recommendation 26: Begin investigating the feasibility and desirability of programming or “retreats” for special interest groups.

Recommendation 27: Create a simple, inexpensive Web-based course to develop staff expertise and test audience response.

Recommendation 28: Continue Listserv programs and tutorials. Evaluate current offerings to understand learners’ views and ways in which they can be enhanced to offer the best value.

Recommendation 29: Enlarge upon the Professional Development area of the Web to create a “Professional Development Home”

Recommendation 30: Hold critical issues, hot-topic, telephone-web seminars four times per year.

Recommendation 31: Continue identifying ways to enhance and increase the number of articles in *Spectrum* for the professional development of members.

Recommendation 32: Use vendor funding to hire top experts in the field to speak at the Annual Meeting.

Recommendation 33: Include authority-based management and leadership topics at the Annual Meeting.

Recommendation 34: Invite leaders from strategically selected organizations to participate in the Annual Meeting as a means of increasing visibility of the association.

Recommendation 35: Carefully review Annual Meeting brochures to be certain that they are being designed and written to maximize the visibility and build the image of the association as a provider of continuing education.

Recommendation 36: Use the Annual Meeting to pilot a carefully designed regional workshop. Do not plan for an Annual Meeting workshop to “go on the road” unless it has been carefully planned for that purpose.

Recommendation 37: Develop a plan to adapt content from high-quality workshops and other Annual Meeting programs for delivery through appropriate modalities.

Recommendation 38: Pay close attention to feedback from the Annual Meeting focus group reports. Continue to conduct focus groups along the same lines to collect data on the learning preferences and needs of members.

Recommendation 39: Once the member curriculum is firmly established, investigate the feasibility of creating programs and products on legal research, particularly a web-based resource center for legal research.

Recommendation 40: Consider granting CLE credit for appropriate vehicles to increase audience and access to those who need credit.

Recommendation 41: Once the member curriculum is firmly established, investigate the feasibility of designing a core curriculum to serve needs of law libraries.

Recommendation 42: Price one-day regional seminars at \$249 and make sure they’re worth every cent. Set the non-member fee at \$329 or more and offer a free membership to AALL with every registration.

Recommendation 43: Price telephone-web seminars at the industry standard of \$149.

Recommendation 44: AALL should compare the financial profile of professional development activities to the standard industry model.

Recommendation 45: Agree upon measurements of success for tangible and intangible benefits of successful professional development programming.

Recommendation 46: Develop a coordinated plan to secure ongoing vendor funding for the professional development curriculum.

Recommendation 47: Establish and support an 18-24 month, strategic level Professional Development marketing plan. Develop and adhere to a detailed marketing plan for each professional development activity.

Recommendation 48: Investigate the feasibility of enhancing Executive Board visits to Chapters to double as professional development opportunities.

Recommendation 49: Formalize a Chapter Relations program that includes components to strengthen Chapter education and publications/newsletters/web sites. This program should be designed in consultation with Chapter leadership.

Recommendation 50: Establish a Chapter Awards program that truly reinforces and awards excellence in educational programming and communications, eg, Best Program, Best Newsletter, Best Web site.

Recommendation 51: Set up a system of mutual accountability between Chapters and AALL to strengthen Chapters and ensure equality of access to quality professional development.

Recommendation 52: Strengthen the Chapter Leader training that you have started at the Annual Meeting.

Recommendation 53: Ensure that an AALL program does not conflict with a major Chapter event, particularly a fundraising event.

Recommendation 54: Maintain present level of educational planning processes in all broad areas of the accreditation standards.

Recommendation 55: Maintain the stability of the education unit and its capacity to organize and produce high-quality continuing education. Continue to employ qualified individuals to administer the program.

Recommendation 56: Continue to use IACET as a planning framework for professional development activities. This will ensure competent planning and encourage education practices consistent with top associations and providers of continuing education. It will also allow you to track continuing education credit for credentialing or other programs you may add in the future; you will be ready to track Continuing Legal Education and other credits should you ever determine to go in that direction.

Recommendation 57: Consider moving educational planning and implementation to the higher or exemplary levels. A comparison between satisfactory compliance and exemplary practice can be found in the Appendix. (See ACCME Decision Making Criteria.)

Recommendation 58: Maintain current level of documenting minutes of planning meetings.

Recommendation 59: Staff should increase efforts to synthesize all information about members and programs into reports that interpret these data and result in concrete recommendations. These recommendations should be supported by data and included in well-constructed agenda books.

Recommendation 60: Continue to promote a bias free independent and non-commercial approach in all educational activities. This will be particularly important if you ever wish to grant Continuing Legal Education credit for a program.

Recommendation 61: Maintain the current practices in evaluating participant satisfaction with learning objectives while monitoring changes in the association arena to greater emphasis on measuring learner outcomes. This may need to change sooner if AALL embraces IACET requirements.

Recommendation 62: Utilize the expertise of staff in instructional design and faculty support to enhance the quality of the professional development activities. Clearly articulate in the Education Manager job description and in the roles and responsibilities of staff and volunteers that staff are responsible for the technical education support in designing programs and working with faculty and for ensuring that the activities are well-designed and delivered.

Recommendation 63: As part of the instructional design of live programs, build in an opportunity for speakers to be rehearsed and critiqued prior to the pilot program.

Recommendation 64: Enhance the process used to design and produce course materials to ensure that they are well designed and prepared. Clearly articulate in Education Manager job description the responsibility for this function.

Recommendation 65: Increase the level of needs assessment to understand learner needs; use the data to plan all educational activities.

Recommendation 66: Develop a learner matrix to help program planners understand the learning needs of all major groups of members.

Recommendation 67: Assemble, in the learner matrix, the wealth of data about the learners that has already been generated through focus groups and research reports; augment this information with the opinions of panels of law librarians representing all major learning groups.

Recommendation 68: Determine how each core competency relates to the learner matrix. Determine what level of each competency each group needs and how best they can acquire the knowledge and information to achieve the competency.

Recommendation 69: After determining what information is needed about each learner group, design a system for ongoing needs assessment to acquire the information.

Recommendation 70: Augment the current evaluation system in place to include greater detail about the preferences and characteristics of participants. Analyze the data for every activity; formulate concrete suggestions to improve all aspects of the design and delivery of the activity; measure the degree to which the recommendations resulted in improvements in subsequent activities.

INTRODUCTION

Background and Project Overview

In 1996, the Professional Development Committee of the American Association of Law Libraries was formed to oversee the professional development and educational activities of the association. When the committee was formed, the leadership felt that it was important to evaluate the committee's process and work products and programs after three years of operation. This evaluation has investigated the work of the Professional Development program at the strategic level, and is intended to result in recommendations in the areas of:

- Professional Development Committee process, eg, roles and responsibilities including the processes used to design and implement professional development activities.
- AALL Professional Development curriculum, ie, activities in total, including their relation to Core Competencies and individual Professional Development programs and products. Recommendations address methods for identification of program topics that meet the learning needs of members, use of appropriate delivery systems, assessment of member learning preferences and needs, and business models for producing professional development activities.
- Collaboration with Chapters and allied for-profit and not-for-profit organizations.

The results of this evaluation will assist the Professional Development Committee to carry out its charge in the areas of long range planning; responsibilities for programming and recommendations to the Annual Meeting Program Selections Committee; needs assessment; communications; collaborative educational endeavors; and educational standards.

Organization of report

This report is organized by research topic as describe above. Part I provides background information and introduction to the report. Part II relates to the Professional Development Committee's responsibilities, roles and processes. Part III relates to the programs and activities that comprise the professional development curriculum and contains recommendations related to collaborative efforts with Chapters. Appendices contain such supplementary materials as accreditation statements and interview protocols and summaries.

Methodology

This evaluation was conducted in accordance with the Program Evaluation Standards put forth by the Joint Committee on Standards for Education Evaluation. Most of the research was conducted between February 1 and March 31, 2001.

The primary methods of collecting data were telephone and personal interviews and analysis of documents related to professional development activities. A full list of

documents analyzed can be found in the Appendix. In-person interviews were held with Roger Parent, Executive Director, and Programs staff, Martha Brown and Mary Jawgiel. Telephone interviews were held with four current members of the Professional Development Committee and two past Chairs, six Chapter Presidents and four members of the Executive Board.

A preliminary report to the Professional Development Committee was delivered at their March 2001 meeting in Chicago. Comments made during the meeting and by subsequent email were included in the data. Comments and questions made during a preliminary report to the Executive Board at their March 2001 meeting also were included in the data.

A Web search was conducted of fourteen related or comparable associations and other continuing education providers for a Comparative Analysis of activities. Follow-up phone interviews were conducted with education staff of seven of these associations. In addition, telephone interviews with twelve other associations were conducted to confirm findings and recommendations contained in this report.

Telephone interviews lasted 45-60 minutes. In-person interviews lasted two hours or more. Some interviews were followed up by email for additional information or clarification. An interview protocol was developed to guide the semi-structured interviews. Detailed notes were taken in all interviews. Interview protocols and results are included in the Appendix.

Conceptual framework for evaluation: The framework for evaluating professional development processes and activities was based on continuing education provider accreditation standards (see Appendix) and recent research in association education that is establishing “best practices.” These two systems look at the education function from different points of view. The accreditation approach provides a more quantitative view based on technical standards and the best practices in association research provides a more qualitative view that takes the unique context of each association into account.

Continuing education accreditation standards are similar throughout all industries. In the past few years, many of them have become more restrictive in an attempt to foster greater excellence in continuing education. At least part of the pressure toward greater rigor in planning and accountability for results comes from public insistence that professions monitor competence in their members. Pressure also comes from employers who typically pay the fees for their workers to participate in continuing education and they want their money’s worth. All systems consider to what extent the provider uses effective planning models. More emphasis is now being placed on needs assessment and evaluation methodologies in an effort to produce and document real learning that enhances performance. Most systems are beginning to require that providers demonstrate learning outcomes in appropriate activities.

This evaluation assessed AALL’s education planning system against the standards of three traditional, well-established continuing education provider accrediting systems: The International Association for Continuing Education and Training (IACET), ABA’s

requirements for Continuing Legal Education, and the Accreditation Council for Continuing Medical Education (ACCME). IACET was selected because it is generic and AALL has already considered its use and begun using it as a framework. ACCME was chosen because it leads the standards in establishing good practice in continuing education, and CLE was included because it is a major credit system that is consistent with other systems, and in case AALL should wish to provide Continuing Legal Education (CLE) credit for any of its activities in the future.

Best practices in association education were based on more than five years of research that included document analysis and interviews with continuing education staff, Executive Directors and education volunteers in more than fifty professional associations. Over the course of the research that investigated how associations went about producing continuing professional education for their members, a picture emerged of a high-functioning association. It became clear that some organizations enjoyed a much higher level of success as measured by reputation in the field and staff and volunteer opinion of the education produced. Staff in the more effective organizations consistently exhibited certain characteristics, including skills sets, attitudes and practices. The best practices research approach compares AALL's approach to education with that of other associations included in the research.

Even though AALL is not bound to follow any accreditation scheme, it is a standard for many associations and industries, so it really "sets the pace" for association performance. Accreditation provides a framework to induce accountability for producing education in an ethical and technically valid manner in terms of the latest understanding of adult education principles and theory. It asks, is the association producing education in the "right" way? Best practices research complements the approach, viewing technical competence as only one aspect of a good education-producing unit. This framework emphasizes how well the education unit, as one of many departments in an association, is satisfying the criteria by which the organization judges its success. It considers to what extent the association is doing the "right" activities including business practices not normally part of educational evaluation.

EVALUATION OF THE PROFESSIONAL DEVELOPMENT COMMITTEE RESPONSIBILITIES, ROLES AND PROCESSES

This evaluation project examined, through documents and interviews, the responsibilities, roles and processes that the Professional Development Committee, including staff, used to carry out its policy and charge.

Professional Development Committee Responsibilities

When staff and volunteer leaders were asked in interviews what they wanted to achieve from this research, almost all expressed a desire to know “if we are on the right track ” in carrying out what they considered to be their responsibilities. Staff also wanted to get a sense of how much responsibility the professional development group should take for meeting the full scope of learning needs of members.

Most strikingly, the interviews revealed a lack of agreement on the part of the Executive Board members, the PDC and the staff on the way in which the PDC operated and the appropriate level of professional development activity in the organization (how much is enough/too much). Furthermore, there was a lack of consensus on who are or should be the primary audiences. There was also a lack of agreement on the value of current professional development activities.

Professional Development Committee interviews: The sentiments of some members of the PDC, as expressed in interviews, were mixed. Overall they were more satisfied with the level and quality of activity than were the Executive Board members who were interviewed. They seemed to enjoy being part of the group and felt that significant progress has been made over the last three years. The committee, some said, appeared to be becoming more member-centered than in the past.

They also said that, at times, they have felt frustrated by the process. They were not certain how supportive the Executive Board was of their activities, although everyone felt that the Board supported the concept of professional development. Several members were concerned that the group was being criticized for “where is the money and time going?” They needed feedback from the Executive Board; they wanted to know “what is good, what is bad. We don’t know if we are on the right track.”

In addition, PDC members felt that the RFP process was bogging them down, and they felt discouraged with lack of results for their efforts. They saw their charge as difficult. For instance, it was important to come up with programs that appealed to large enough groups, but then they found that the content was “watered down.” This was also true for partnerships with other organizations; PDC members said collaboration takes “a lot of time and relationship building, but the content was not on center to meet specific learning needs.” Most everyone felt that marketing has been poor. Chapter relations were a problem “because no one wants to offend anyone, Chapter leaders don’t communicate with each other, and efforts to build relationships don’t survive leadership transition.” Another said, “The problem is, we listen to whatever we hear. It is better to set the plan

and don't change it for every criticism. Then get it validated every few years. We take all criticism to heart. We can't do that and keep moving. The PDC has responsibilities, staff already has accountability. Set the plan and keep moving."

PDC members did not agree on what the benchmarks for success should be; number of people served, money, excitement among members for programs were all mentioned as potential benchmarks. But, the concern lingered that the programs may never succeed. As one said, members may never attend Professional Development regional programs – they don't leave their offices. The problem may be librarians themselves.

Executive Board member interviews: The Executive Board members who were interviewed were less positive about the level and quality of the professional development program although they expressed commitment to the need for and their support of professional development and education. There were concerns with the process. As one said, "We have let PDC have autonomy and we have disagreed with the mechanics of how things have been carried out." Another attributed problems to the fact that the "PDC as a committee has had strong personalities who have set their agenda. I'm not sure how many of the decisions come from staff and how many emanate from the committee." Still another felt that the committee was not functioning as well as it could. "It's very territorial. It has been bogged down. It needs to step up and reassess how it's going about its business. Maybe collapse, recombine, in other words, restructure."

Executive Board members expressed varying levels of satisfaction with professional development activities. One said, "We hear negative things traveling around the country." Another said, "Current programs don't stack up at all. We haven't progressed well at all. There are not enough programs – there should be at least one per month and a diverse range of offerings of different types of programs for different jobs." "If we don't begin to see improvement," another said, "as the Executive Board rotates, the new members are going to start asking why we aren't doing better."

Several mentioned the cost versus value of programs. One said, "We hear a lot about the high cost of programs versus the value, but the real complaint is there is not a lot of value – they don't get much for their money. High value means content must be substantial, in presentation and in handouts. This doesn't happen now except for Copyright [program]." Another felt that PDC should be creating programs that give most members "the most bang for the buck. A decent number of opportunities at a reasonable price...If we don't cut costs, people are not going to pay and the program will die a slow death."

Some felt that the limit of activity had been reached or exceeded. "We need to get a grip on the scope of activity. We've reached the limit. The program has been extra ambitious, very aggressive. Some members say it's too much. The Board hears complaints about members being bombarded with buy, buy, buy; participate, participate, participate. Librarians also have all these other groups coming at them." Others felt that more activity was needed. One suggested that there should be at least one program per month; another suggested that AALL should have "four or five programs in hand so if someone calls, we're ready to go."

Some offered suggestions for improving programs. “We shouldn’t always look to our members to be presenters.” “Programs must be very convenient – a half, not a whole day. They are too busy to come out.” “The key is to catch them just in time – the right information at the right time.” “We need continuing education for a variety of levels of librarians - for those with different years of experience and different types of libraries.”

There was some agreement on solutions to the problems. Most felt that the PDC had it within their means to come up with better programs. As one Executive Board member expressed, if the “PDC acts as a think tank and staff does the work. Get the right people on the PDC (which has been done) – those who are future thinkers and know the field and can be a rainmaker and can identify resources.” Another said, “They’ve wasted a lot of money and time on research. Forget more research. PDC, put your heads together and you can come up with a plan. For example, go after public library association – there are 100 public librarians for every one of us. They need help with the law. The law librarian audience is narrower than we need it to be. Go after others.”

Most agreed that the association, meaning the PDC and Executive Board, needs to set benchmarks to achieve in a set time frame. “We need to set measurable achievements and then we need to achieve them.” One Board member added that, although it would be less easy to measure than concrete benchmarks, “we’ll know we’re successful when we start hearing positive feedback and less whining about cost and placement of programs.”

My observations based on Best Practices in Association Education research: The answer to the question, “Are we on the right track?” is “Yes” because the PDC was created to increase the level of professional development activity and it has done that. And “No” because, based on practices I have seen in the most successful associations, the fact that everyone is clearly not “on the same page” is potentially destructive to this organization. In best practices associations, aspirational, but achievable, goals are clearly understood by staff and volunteers alike. “Everybody’s in it together.” And, they know exactly what they are expected to produce.

The lack of agreement is obvious in all conversations with Executive Board members. PDC members feel more positive about their activities but I believe they cannot sustain the level of activity – current members will burn out, and younger members taking their places may want no part of the work as it’s currently being done. In AALL, like most other associations, there is little room to absorb this tension. If the tension were resulting in greater creativity (in other words, creative tension) I would recommend ways to manage it. I don’t see any signs that laboring through a system as it exists is beneficial to the association.

The answer to the question, “How much responsibility does the organization ultimately have for the continuing education of a member?” is this: The appropriate level of education activity is that which keeps members satisfied enough to retain membership. It varies from year to year depending on changes in the industry and world; it changes as

the member advances through his or her career. An association must continually monitor and adjust the level of activity to retain and attract new members.

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.

Mission/Goals and Policy Statement: When disagreement occurs, the first place to look is alignment between stated goals and charges and how the words on those documents are being operationalized. Continuing education providers should have an educational mission statement that is linked and supported by the organization mission.

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.

The Mission of the organization and the continuing education unit may be broad enough to allow for flexibility, but it must be made perfectly clear through yearly or other strategic initiatives what the scope of activity is (and is not) currently and for three years. Longer is probably not desirable in this climate of rapid change. This promotes continuity of the overall program that transcends turnover of volunteer and staff leadership. There should be a statement to explicate the level of activity expected and the limits of the financial and other resources to be devoted to carrying out the charge to members.

Although the AALL Mission statement does not specifically mention “professional development,” the statement “supports and serves its members” is broad enough to allow for this interpretation. The organization operates as if education were at least one of its primary missions without stating it. The Professional Development Policy and Structure statement, then, more closely interprets the Mission as it applies to specific association activities.

I have simplified the language to capture the essence of the policy:

- To provide members and non members with educational opportunities.
- To enable the members to keep current in the profession with readily available, high-quality and timely programs, products and publications using appropriate formats and delivery mechanisms.
- To enable members to meet core competencies in the profession.
- To provide non-members with education in our field.
- To collaborate with other organizations including Chapters.

These are my concerns with the PD policy statement:

Audiences: In wording of the first and fourth goals and, in practice, it is unclear that AALL's *primary* audience is members. Some associations, particularly advocacy groups, do not distinguish between members and non-members because they primarily educate the public, not the membership. AALL does not operate the professional development component in this fashion.

With finite resources, it takes all of an association's resources to discover and meet the learning needs of their major constituencies. This is particularly true in AALL when there are distinctive groups with distinctly different professional characteristics.

The primary audience must be the *majority* of current members. It is the only way to ensure members remain satisfied with the level of education service the association provides – one of the primary reasons why they join and retain membership in a professional society.

The secondary audience must be professionals who are Chapter members but not National members. The Chapters are feeder organizations and the Chapter-National relationship must be kept strong. Ideally, the non-National Chapter members should wish to become part of the National organization because of the extraordinary advantage of being a member.

It is appropriate to target segments of non-members for appropriate programs and products that have been created for members because it is an important means of recruiting and bonding individuals to the organization.

It is also appropriate to expand the reach of specific programs and products to appropriate non-members as a device to make money and/or extend visibility into the community. However, the services to members should never be sacrificed to these activities.

Recommendation 3: Designate the *majority* of current members as the primary AALL audience.

Recommendation 4: Designate those who are Chapter members but not national members as the secondary audience.

Recommendation 5: Target non-members for appropriate programs and products that have been primarily created for members as the third ranked audience.

Recommendation 6: Only if the needs of the primary and secondary audiences are fully served, appropriate non-members can be targeted to expand the reach of specific programs and products as a device to make money and/or extend visibility into the community.

Delivery systems: Those who were interviewed expressed much more concern with increasing the number of delivery mechanisms, (consistent with the second statement,) than with achieving the actual goal: to enable the member to remain current. Professionals throughout North America, regardless of their field, rate “keeping current” as their number one reason for participating in association education. So, it is very commendable that the goal is part of the professional development policy. I’m concerned that it is being lost in the details of delivery systems that are only means to achieve the goal and not an end in themselves.

In the past few years, most associations have felt pressure to provide technology-based distance learning. Those that ventured out with cutting edge technologies often got burned with a very poor return on investment, and are now taking a much more conservative approach to distance learning methodologies. (See Part III for specific recommendations on this subject.) I have a sense that AALL is struggling to balance the need to be up-to-date in delivery systems with the true cost of using them.

Recommendation 7: Emphasize the importance of helping members to stay current in terms of professional knowledge using the most appropriate and effective delivery system. Relegate the use of multiple and diverse delivery systems to a means to achieve the end.

Collaboration with allied organizations: In document analysis and particularly in interviews with volunteers and staff, collaborative activities, eg, TTIP programs, were discussed as if they were primary educational offerings when, to an outside view, they compete with AALL-produced programs. Staff seemed somewhat more eager to partner with other organizations than did volunteers, but I had the sense that establishing a number of education program collaborations was being viewed as a desirable goal in itself.

Engaging in collaborative activities with outside organizations, the fifth goal, should be a means to an end, not a goal in itself. The types of collaborations to which I refer are those where it is clear that they are being produced by other organizations, even if AALL members sit on the planning committees. Collaborative relations for educational purposes are akin to delivery methods – another way to reach the audience and meet their expressed needs. In an effective association education unit, partnerships are used judiciously to extend and complement the education programs that have been produced as a *primary member benefit*. Collaborative activities are not a substitute for primary education activities that should be produced by the association for the association. It is most important that members see the parent association, not another organization, as the provider of the education that meets their most important educational needs. It is very important to understand the role that education plays in the views of members before promoting other organizations’ activities over yours.

Recommendation 8: After designing a professional development curriculum (set of activities) that is clearly produced and marketed by AALL as a major member benefit specifically tailored to meet member preferences and needs, determine which, if any, of these activities could or should be produced in collaboration with allied or other organizations.

Collaboration with Chapters: It is, however, appropriate and commendable to formulate a goal to work with Chapters to extend educational opportunities on a local level. Chapters are part of the organization, and should not be categorized with other profit and not-for-profit organizations. They deserve their own category.

Recommendation 9: Establish a Chapter Relations program to support high quality professional development opportunities at the local level. (See section III for specific recommendations.)

New Purpose Statement: To summarize: As a start, the Purpose statement might read: AALL Professional Development activities will serve to: provide a major member benefit, by meeting the expressed professional development needs of members; increase the visibility and credibility of the organization through appropriate dissemination of information about these valued and valuable activities; extend appropriate professional development opportunities through partnerships with appropriate organizations when it is clearly impractical to develop them; and bind the National association and its Chapters together through a program that provides information and educational support to help Chapters' in educating their members.

Professional Development Committee Roles

Interviews with Professional Development Committee and Executive Board members revealed frustrations and concerns about the roles of the PDC members. One PDC member said, "It is frustrating to the PDC that we continue to have effective staff, but rely so much on volunteers.... PDC can only function effectively if supported by adequate staff. Once the PDC decides what they want, staff should work with them as experts in the field. PDC should not spend time working in details. They should decide scope, direction, kinds of programming, general suggestions and staff should carry them out." Another member said, "We have good staff, so why do we rely so much on volunteers. It makes everything move at a snail's pace."

An Executive Board member commented, "The committee is too much in operations. They need to place appropriate tasks with appropriate people. Perhaps we need to redesign headquarters staff. Staff need to step up and fill in the nuts and bolts. It's still very important for members to be involved in content. We need more spontaneity so that we can use new members' creative ideas. This means the roles played by volunteers need to be somewhat amorphous – need space to do what needs to be done without sinking into operations and minutiae only."

“Doing administration is easier, it makes you feel like you’re contributing and making progress. Newer librarians see themselves as professionals. They get this message from library school – you don’t do menial work. Fossils see themselves differently. There has been an interesting cultural shift. What this means is that newer volunteers coming in are not going to want to perform the work, they will embrace different roles. Staff will have to perform the work to keep the volunteers involved. Staff can ask, ‘How do you want to do this? Or, what do you feel is the best way to get this done?’ That’s okay. Staff might be resistant – there are strong personalities at headquarters.”

Another said, “Martha has the responsibility ultimately for the bottom line and needs enough staff support to carry out the program. PDC needs good staff support that really guides them and carries out the details. Adequate staffing is a requirement for the program to work.”

Staff also had several concerns with the design of the volunteer function and the way in which the work was being carried out. They wondered whether or not there could be a better way to go about the work, and suggested ways the processes could be improved, such as providing more consistent feedback between meetings and better communication in general to volunteers.

An effective association must have sufficient staff and volunteers to carry out the plan. The assigned tasks must appropriate to accomplish the goals, the workload must be manageable, and staff and volunteers must be competent to perform the tasks.

When the point of contention arises that staff need to take on more or different tasks, the reasons are consistent in most associations. The first problem area is usually the governance structure and the degree to which staff or volunteers “rule the roost.” The second comes from overly ambitious goals having been set without taking into account the number of staff work hours to achieve the task. In the same vein, ambitious goals are undertaken with the assumption that volunteers will fill the roles, and volunteers, as they work through the charge, find they have little time or interest in these activities. The other area is competence of staff to take on the specific activities.

The role of the association volunteer used to vary considerably from association to association. Today, volunteers, like all other professionals, have trouble finding free time, and more and more associations are shifting their governance system to a “staff driven” approach. The most popular approaches are those espoused by Glen Tecker or John Carver, one of which has been adopted by AALL as its Executive Board governance philosophy.

Volunteers usually are most qualified to serve as subject matter experts. Staff, by virtue of their technical and program administrative training, are usually more qualified to fill the technical and administrative roles. This is true of AALL. According to the minutes of their meetings and interviews, the PDC members are more heavily involved in course administration than I believe they should be.

If the Professional Development Committee was to operate in keeping with the governance model used by the Executive Board, it would be considered a policy level board and certain of the items in their charge would be appropriate for a policy-level board, other items would be the purview of staff.

The ideal roles for a policy-making group complement staff roles. As subject matter experts, they help staff interpret learning needs of members; they serve as ambassadors for activities, using personal influence and leadership when needed to secure resources; and serve as subject matter experts when requested by staff.

Recommendation 10: Reorganize the Professional Development Committee as a policy level board that is composed of representatives from each major member constituency and major planning groups.

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.

Recommendation 12: Long range planning should be joint functions of staff and PDC.

Recommendation 13: Staff should take responsibility for all technical education areas (“means”). This includes, but is not limited to, needs assessment, evaluation, communications/marketing, identifying program topics and presenters, and program design, planning and implementation.

Recommendation 14: Staff should be empowered to create ad hoc committees of volunteer subject matter experts as needed to perform specific tasks and activities.

Recommendation 15: Staff should establish and manage collaborative arrangements with Chapters and other organizations as they relate to program design and management.

Recommendation 16: Establish an orientation and training program for the Professional Development Committee to help them function in their assigned roles. This program might be similar to annual Executive Board governance training programs described by staff.

Professional Development Committee Process

Interviews with members of the PDC revealed a serious lack of comfort and consensus with the planning process. The words, “bogged down,” were repeatedly used to describe the process. They were concerned with their ability to respond fast enough to emerging needs. One said, “The RFP is good and bad. Our process takes a long time, although it seems better this year... The problem with the long time lines is we can’t be as “responsive.” Another said, “There needs to be a faster turnaround time. The RPF and

association processes are making us late to the game. We need to simplify the process.” Another member amplified this thought, “We have used a contributory process in the past, everyone contributing their thoughts, collaboratively, and it’s bogged us down. Our RFP process – damned if you do, damned if you don’t. If you ask them, you’re slowed down, if you don’t, they say you should have asked. When do we stop being fair and just do it?”

RFP process: The committee is to be commended for making every effort to use a democratic planning process that gives the opportunity for interested parties to make a contribution and have their voices heard through the RFP. Unfortunately, I don’t think it is worth the effort being expended. I’m inclined to agree with the committee member who said, “When do we just get on with it?” Some societies enjoy success with a program proposal process, particularly scientific societies in which members are accustomed to producing grant proposals and program “abstracts.” This is also seen in large associations in which there is very heavy competition for Annual Meeting program slots. It should be noted, however, that in these associations, staff for the groups often do the actual writing of the proposals.

All of the research indicates that the committee, including staff, needs a far more fluid approach that allows them to make decisions and deliver programs in a much more timely fashion. This suggests doing away with the RFP as it exist and simply letting members and other interested parties know via the web site that the organization welcomes ideas which should be channeled through the Director of Programs to determine the viability. Good ideas that are brought forth can be shared with the staff team who can determine the best delivery systems.

I know that neither staff nor volunteers want to make anyone unhappy – I heard this repeatedly in the interviews – but inappropriate ideas should not be allowed to take up valuable volunteer and staff time, and the most appropriate person to efficiently screen them is the Director of Programs.

Recommendation 17: Do away with the RFP in favor of a simple mechanism whereby the Director of Programs determines the viability of an idea for a program and takes expedient steps to contract with a presenter.

Political Pressure: A footnote is needed here: from comments made by volunteers and staff, I feel that there is a good deal of pressure to bow to political considerations in this organization. I heard many comments to the effect that “so and so doesn’t like this, or such-and-such a group would never go for that.” Staff described several ideas as “red flags” in the eyes of volunteer leaders. This type of political concession may be part of daily life in an association. Unfortunately, it can be dangerous when it keeps the organization from constructing programs and products to keep members happy. Some of the ideas being blocked or disapproved of would likely improve the services the association provides to members. The needs and preferences of the members, not the leaders and staff, must come first.

Staffing levels: When it comes to appropriate levels for staffing, association or industry ratios are of little use because each association is unique in what it needs to produce to retain satisfied members. Most associations today have been forced to become “lean and mean” to protect the bottom line. I believe AALL needs the current program staffing level of two full-time credentialed professional educators to carry out the amount of activity in the work plan. It is to the credit of the organization that it supports two full-time educators with impressive credentials in the field of adult continuing education. Just recently, they’ve added distance learning competencies to the mix. It is also important that the Director of Programs ensures integration of all professional development programming by overseeing the Annual Meeting and all professional development activities.

One major issue I heard about in interviews was the salary cost of the Education Manager position that was created to administer professional development activities. Both staff and the Executive Board expressed concern with “What happens when we run out of soft money? How do we finance the programs?”

There is no easy answer to these questions. AALL leadership believes it is important to produce high-quality education in addition to the Annual Meeting. I concur with that. AALL faces a dilemma: in terms of standard practices, it probably cannot afford the position. By standard industry education program business practices (LERN), indirect costs for any program should not exceed 35% of projected registration revenue. Of this 35%, LERN recommends that staff salary/benefits costs not exceed 20%. A rule of thumb is that a staff position should produce 5 times the annual salary in program revenue to recover the 20%.

A common practice in associations is to group all educational activities under one financial umbrella wherein the revenue of the Annual Meeting and, less often, journal advertising revenues, cover the cost of all education staff. Many associations never assign direct staff cost to any activities other than those that are grant funded. Whatever the employment arrangement, it is very important that it be explicit to the employees involved.

The Executive Board and/or the Executive Director need to determine whether the position is based on a percentage of required income, is absorbed in overall staff cost, or is outsourced. I don’t recommend the first and third options. As previously stated, sufficient revenue is unlikely to be consistently achieved in the very near future. Outsourcing may seem more viable, but I don’t think it’s desirable that the expertise to produce these programs resides in an educator who is not part of the staff. I worry about the amount of organizational and team learning that would be lost.

If the decision is made that the Education Manager position is contingent upon cost recovery, it must be made clear what the criteria for maintaining the position are. Many organizations expect a staff position to produce programs by set financial criteria provided they are reasonable, achievable objectives. This is consistent with practices in high performance associations. But, again, the criteria must be achievable and the

expectations must be written into the job description and the terms of employment be made clear.

Recommendation 18: Maintain two professional educator positions at AALL to administer professional development activities. Determine and clearly articulate the terms of employment of the Education Manager position.

Meeting Planning tasks: In the association industry, meeting planning activities are increasingly being separated out from continuing education activities due to the degree of specialization that is being required from each position. Meeting planning skills save the association thousands of dollars in negotiating for meeting space and housing; educators have an entirely different charge to produce high-quality learning experiences. I am making a distinction between the part of continuing education production that is “logistics planning, ”eg, registration, housing, travel arrangements, badges, meal functions, etc., and the part that requires a trained educator to create learning experiences, eg, evaluations, measurement of learning, needs assessment, instructional design, etc.

Interviews with professional development staff revealed that they undertake varying amounts of meeting planning responsibilities, depending on the project at hand. As their roles shift to include more technical education production, they should clarify and agree upon which tasks will fall into meeting planning and which tasks will fall into technical education. This is common in all associations, as management becomes aware of the need for the educators to go beyond “program planning” into true education production.

Recommendation 19: As the Education Manager and/or Director of Programs increase their level of technical education activities to design and produce professional development activities, any meeting planning responsibilities should be passed to the staff Meeting Planner, freeing the educators with formal training in Adult Education to use their unique skill sets to better advantage.

Extended staff team: The placement of the education unit in the effective association is carefully designed, allowing it to marry resources, goals, staff, training, experience, research, etc. All education delivery modalities are identified and integrated into a cohesive, manageable, integrated system. By contrast, in less effective associations, education exists in independent silos throughout the association, where staff do not share information and often compete for the resources they need to do the job.

By taking an integrated approach and expanding the education producing team to include periodicals, Web-based education support, and other print-based products, AALL can achieve a far greater integration of educational activities. This approach will make it much easier to assess the actual level of information and education that is being produced for the members and determine the true cost of production. This approach increases the likelihood that staff will discover opportunities to extend products and programs by producing derivatives or “repurposing” education for other delivery mechanisms, thereby increasing the efficiency and extending the reach of professional development activities.

Recommendation 20: Create a Professional Development staff team that is responsible to the Executive Director to carry out the Professional Development Mission. Permanent members of this team should include the Director of Programs, the Director of Publications, the Education Manager and the staff member who manages Web content. Periodically and as needed, the Director or Finance or staff member(s) charged with responsibility for funding, the Meeting Coordinator, the marketing consultant and the person in charge of Web technical services should join the team.

Print-based education: As this research evolved, I noticed that, with the exception of the Desktop Learning Series in *Spectrum*, print-based products were not included in professional development activities. The primary way that professionals throughout the country get information to do their jobs is through print-based materials. This is particularly true for those (almost all professionals) who do not have the resources to attend live meetings because of the cost and can't afford time away from the office and/or family.

Many associations are combining professional journals and periodicals with education or professional development in order to ensure topic coverage and to more easily develop derivative products. An example of this is the Association of Legal Administrators which placed the periodicals and education products under the auspices of the Professional Development unit so that there could be coordination between various systems for delivering professional information to learners.

The *AALL Publications Program: Statement of Purpose* is complementary to the PDC Charge. There is considerable overlap between the two areas, and combining the two functions into one that is governed by one oversight or policy-making body will be more efficient. In this case, the publications statement of purpose should be combined with or at least be consistent with the professional development mission statement. Each activity can then have its own planning committee as desired or needed by staff to implement these activities.

Recommendation 21: Integrate publications that deal with professional development into the professional development activities.

ASSESSMENT OF PROGRAMS AND PRODUCTS THAT COMPRISE THE PROFESSIONAL DEVELOPMENT CURRICULUM

Evaluation of Current Programs and Products and Suggestions for Future Activities

AALL now has more than three years of data on Professional Development activities to use as a basis for building its ideal curriculum. The staff and volunteers have learned a lot about producing activities over this period of time. It's much easier to build upon successes than to create and sell new products. Similarly, it's much easier to induce a current customer to become a repeat customer than to convert a non-user to a user. The general strategy for a successful association professional development program is to select basic educational vehicles that will build the program in the long term. These vehicles are designed, first and foremost, to meet the needs of the members so that they remain satisfied with their membership in the association. Should short-term opportunities come along through partnership or new ideas, carefully select those that complement the mix of professional development activities. Remember that diffusion of innovation takes time, at least three to five years. Don't expect instant results – stay the agreed upon course.

Recommendation 22: Design and establish a professional development curriculum (set of activities) from vehicles discussed below that ensures the highest possibly quality of programming that will surprise and delight members.

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

Regional programs: Program evaluations and interviews indicated that several problems have affected the success of professional development regional workshops. One volunteer said, "Every Chapter is going to have someone on their Board who is killing the project. This is, in part, due to bad feelings about the [PD] committee in the early days, people 'turning a blind eye' to the programs. In other words, blocking their success." Staff, dealing with the Chapter, have been unsure whether it was better to place the program and offend the uninterested Chapter or not place the program and fail to meet projections. If Chapters and the National organization had a stronger working relationship, the Chapters may have more readily supported workshops in their area. But, it doesn't appear that sufficient relationship building has taken place. I think these problems could eventually have been transcended if all of the Professional Development regional programs were superb. Unfortunately, I don't think they were.

As one Executive Board member said, "We hear a lot about the high cost, but value is really the complaint – they don't feel they get enough value. Value means substance in presentation value and a substantive handout. There are no programs like this with the exception of Copyright." The evaluations show a picture of programs that are acceptable. They are probably as good as the programming produced by most associations. But they aren't good enough to accomplish what AALL is trying to achieve. Meticulous care must be used in designing these programs. They must be astonishingly good.

Staff need to carefully and objectively analyze the data on road shows; build upon the winners, concentrating efforts and promotion on successes. Don't waste time trying to fix less successful programs. I'd advise staying away from multi-day seminars. The time required out of the office makes them very hard to sell and the expenses are too high. Road shows, by their nature, are presenter-centered. Stay away from programs that require more than two presenters. One presenter is ideal from the point of view of program management and expense control. Of course, the presenter has to be letter-perfect.

One approach that has worked for other associations who have modified their approach and redesigned programs (which happens in the market place all the time – “new,” “improved”), is to promote to Chapter leaders the message that “We hear you, we want to work with you, and this is what we've done to give you what you want.” In other words, they sold the concept of the redesign as well as the programs.

If the level of activity of three programs seems to be manageable and the programs are well received, plan a rotation, retiring one program and adding one program every year.

Recommendation 24: Select Regional workshops that are based on the three (or four, if manageable) best one-day, one-speaker, regional workshops to present as soon as possible. Design or redesign, as needed, to ensure the highest quality standards, and market them heavily to the membership and Chapters.

Regional conferences: Chapter leaders interviewed showed enthusiasm about joining with other Chapters to produce a 1.5-2 day annual program. They asked, however, that staff do the work. This strategy has worked very well for other associations who provide high quality continuing education that is underwritten by vendor funding. It is probably the most efficient system for reaching members in Regions because it provides the opportunity for multiple topics and speakers to satisfy the needs for diverse audiences and it allows the opportunity to capture regional and local vendor funding. If AALL is successful in establishing regional conferences, they will likely eventually replace regional workshops or the workshops will gradually integrate into the conferences.

The most common model is organized and administered by staff with Chapter representatives serving on the Planning Group to identify local speakers and important topics. In some associations, revenue is maintained in a regional fund to provide assistance with education for Chapters in that region. Other associations share the revenue with the participating Chapters.

Recommendation 25: Begin investigating the feasibility of Regional, multi-Chapter conferences. Staff should take the lead in organizing, designing and implementing these conferences.

Special interest retreats: The focus groups suggested the presence of certain groups that may have specialized learning needs and interests. As the learner matrix takes shape,

learning needs are likely to emerge as unique to certain groups of practitioners. This might be particularly true, for instance, of the very experienced law librarians from a particular work setting. One strategy that works well for other associations is a Retreat. This is usually a 1.5 to 2-day event in a resort setting that offers a presentation by some expert or noted authority, but includes a lot of time for formal and informal idea exchange. The Association of Legal Administrators, for example, is very successful in holding a Large Firm Administrators retreat for very experienced practitioners from larger firms; they also hold a Corporate/Government administrators retreat every year. These events commonly attract a great deal of vendor funding.

Recommendation 26: Begin investigating the feasibility and desirability of programming or “retreats” for special interest groups.

Distance learning: Views of leaders on distance learning expressed in interviews varied considerably. These comments illustrate the diversity of opinions of PDC members about delivery methods other than live programs:

- Not sure about the amount of learning you get from the Web
- Web-based education is expensive
- Web-based – not worth spinning our wheels to make it work.
- Video-conferences – content was watered down to please all.
- We’ve gotten it together for the video-conferences, now we need more support to make them really work.

Comments of Executive Board members were similar:

- Web-based programming is costly and hard to do. Wouldn’t discount it, but sounds like too much money for a small group. Maybe tutorials which are not expensive or fancy.
- Would like more web-based education. But make sure we don’t spread ourselves too thin.
- Web-based programming is very easy to use – might be okay.
- Video-conferences are awful – won’t do that again.
- Done a pretty good job on video-conferences.

In my view, AALL’s approach to distance learning has been better than you realize, at least in the area of online programming. As part of the Comparative Analysis with other organizations, I talked to staff at several associations who have spent a lot of resources on Web programming with a very low return on investment. The exceptions were the associations with large international components who had enjoyed considerable success in their efforts. Most of the associations have recently revamped their online programming and are now proceeding very conservatively. They are slowly building up staff expertise and programs as they build a user base.

Essentially, AALL has taken the same approach through the online tutorials, listserv activities and provision of Web-based information. These activities seem to be well regarded by users, faculty and organizational leadership. The best current advice from online learning experts is to build distance education strategies upon successes,

particularly trading on good word of mouth from programs. These might be “repurposed” versions of successful events - identifying a program you already have been promoting that offers good content. Constructing a high-quality course on Legal Research might be a great investment because of the widespread interest and need for the topic. Experts advise starting very simply in terms of technological bells and whistles because it allows the lowest front-end investment and the programs are accessible to more users.

Fortunately for the association, Mary Jawgiel recently completed a highly regarded distance learning education program. She has a good knowledge of online programs and strategies. Capitalize on her interest and skills. It is important to build up your experience and expertise. Most experts feels that on-line learning will become more and more important to association education and AALL will be well-placed when the time comes.

Recommendation 27: Create a simple, inexpensive Web-based course to develop staff expertise and test audience response.

Recommendation 28: Continue Listserv programs and tutorials. Evaluate current offerings to understand learners’ views and ways in which they can be enhanced to offer the best value.

Web as a Professional Development home: A concept that is becoming increasingly popular is the Web as a Professional Development home. These sites are compendiums of resources designed to offer “one-stop professional information shopping” for members. In this concept, Web information and resources are packaged as a member benefit. As opposed to information about the association activities, they focus on serving the needs of the individual practitioners.

Very often these sites contain a lot of easily accessed professional information such as articles and other documents and links to other useful web sites. They often link to degree or other programs. For example, AALL could partner with Association of Legal Administrators in their web offerings of Skillsoft programs on management and leadership topics, possibly with an invisible link. The more sophisticated versions of Professional Development Homes offer self-assessment opportunities to test practitioner knowledge and skill in core competency areas. This might be an idea for future programming.

Recommendation 29: Enlarge upon the Professional Development area of the Web to create a “Professional Development Home”

Telephone-web seminars: Most of the associations included in the Comparative Analysis were successful in presenting telephone-web seminars, most commonly using KRM as the vendor. This is a simple strategy that requires a minimum of staff time. The technical provider does the promotion, registers the participants, delivers the handouts and handles the technical hookup for a per site charge. Their personnel are very experienced and helpful in consulting on speaker preparation and topic selection. I recommend using a technical provider to conserve staff resources.

AALL should consider producing four telephone-web seminars per year to establish the “product line” in the minds of members. Keep in mind that it may take a year or more to establish this mechanism so that your programs are fully subscribed. These presentations should have no more than two popular, well-known speakers and should be on “hot topics.” The topics should be information listeners must know to keep their jobs as opposed to “nice to know.” One important advantage of telephone seminars is that they can be used by the member organization for staff training or by Chapters for education programs; as such, they are highly valued activities and powerful visibility tools.

Recommendation 30: Hold critical issues, hot-topic, telephone-web seminars four times per year.

Print-based education: Professional Development Committee minutes mentioned that the committee had considered ways to enhance the *Spectrum* Desktop Series through such strategies as action plans at the end of an article, food-for-thought questions, and lists of other resources. *Spectrum* is well established and is the most likely vehicle for articles that are not written in scholarly fashion. Many associations have increased the success and popularity of the “newsletter” publication by diminishing the amount of Chapter news and increasing the professional topic coverage. An increase in the number of professional articles opens up the possibility for derivative products like special topic editions sponsored by one or more vendors. Of course, the more prestigious and widely read the publication, the easier it is to get authors and advertisers.

Recommendation 31: Continue identifying ways to enhance and increase the number of articles in *Spectrum* for the professional development of members.

Annual Meeting: AALL has an excellent Annual Meeting. Don’t take it for granted; it is the cornerstone of your programming. It should be your first priority to keep it strong.

Expert speakers: Use vendor funding to hire top experts in the field. Using these speakers sends a message to those who attend the Annual Meeting and other association members. It shows awareness of the latest authorities, what books they’re writing, and new ideas members should be introducing into their own work environments and lives. Using top experts is also a primary means to keep seasoned practitioners satisfied.

It is important that AALL be seen as leading the field as opposed to reacting to changes in the field. It is vitally important to anticipate the next important topics in the profession. AALL should be informing the members what they will need to know to survive in the next few years. They should be hearing important things at this event that they didn’t know so that they come away saying, “I can’t afford to miss this event if I’m going to be a law librarian.”

Vendors usually welcome the opportunity for the recognition of linking their company with top experts. They are particularly receptive if they have the opportunity to meet the speaker and introduce the speaker to the audience.

Recommendation 32: Use vendor funding to hire top experts in the field to speak at the Annual Meeting.

Leadership and management topics: When volunteer leaders were asked in interviews what topics they felt would serve most members, the responses were consistent: management and leadership issues like dealing with difficult people. At the same time, the volunteers were very conflicted about this, frequently following up with, “But, is this what we should be doing? We don’t do Fred Pryor programs.” There is a place in every profession for learning about management of self and others. The ideal place for this is the Annual Meeting, where you can afford to have authorities in the field present this type of information in a professional manner. Keep in mind, management and leadership topics are also scholarly and researched based – they shouldn’t be lightweight or “fluffy.” To give them validity, these topics should be presented by leading authorities in the specific field (as opposed to members who lack the credentials in the topic.)

Recommendation 33: Include authority-based management and leadership topics at the Annual Meeting.

Leadership exchange: The Annual Meeting is an ideal opportunity to partner with and establish friendly exchange with the leadership of other organizations. It gives AALL exposure to the leadership of other groups, lawyers, Bar associations and so on that is hard to accomplish in other individual activities and is a great way to increase visibility to the extended community.

Recommendation 34: Invite leaders from strategically selected organizations to participate in the Annual Meeting as a means of increasing visibility of the association.

Promotional materials: The promotional brochure and the on-site program guide often have very wide distribution in the community and therefore offer the association a great opportunity to increase visibility. They should be carefully designed to paint the picture of the AALL that you want people to see. In black and white, the Annual Meeting materials depict who law librarians are as a group of professionals and the program depicts what subject areas and which experts they value. It shows the association’s grasp of the industry.

Recommendation 35: Carefully review Annual Meeting brochures to be certain that they are being designed and written to maximize the visibility and build the image of the association as a provider of continuing education.

Recycling workshops: Although some of the leaders interviewed still held fast to the notion that Annual Meeting workshops should be recycled into traveling road shows, I would caution the planners. There is usually nothing wrong with piloting a road show at the Annual Meeting, in fact it offers a good opportunity. But the reverse rarely holds true. Just because a program seems to be successful at the Annual Meeting, it doesn’t automatically work well as a stand-alone. Stand-alone programs have their own

requirements. There may be other more appropriate ways to “repurpose” the material from an AM workshop. Examples are white papers, best of conference proceedings, telephone conferences, Internet-based programs or journal articles. These initiatives work best when they are designed from the beginning to be adaptable to other modalities.

Recommendation 36: Use the Annual Meeting to pilot a carefully designed regional workshop. Do not plan for an Annual Meeting workshop to “go on the road” unless it has been carefully planned for that purpose.

Recommendation 37: Develop a plan to adapt content from high-quality workshops and other Annual Meeting programs for delivery through appropriate modalities.

Feedback: The focus groups gave exceptional feedback about the Annual Meeting. After reading evaluation summaries from hundreds of events, the feedback from focus group respondents rings true as good advice to event planners, and not random “crank” opinions.

Recommendation 38: Pay close attention to feedback from the Annual Meeting focus group reports. Continue to conduct focus groups along the same lines to collect data on the learning preferences and needs of members.

Legal research education for non-members: Once the member curriculum is well established, AALL should consider constructing education for groups outside of the membership. When you do extend education and information to outside groups, it must be of the very highest quality to increase visibility and enhance AALL’s reputation.

At least two volunteers mentioned in the interviews that they felt AALL should capitalize on their unique expertise in legal research. As one leader said, “AALL should consider establishing itself as the foremost provider of information/continuing education in the niche of legal research.”

In the proliferation of highly targeted education and other resources readily available, establishing an appropriate niche helps establish the “brand.” The more narrowly defined a category, the easier it is to design and market a successful product line.

Recommendation 39: Once the member curriculum is firmly established, investigate the feasibility of creating programs and products on legal research, particularly a web-based resource center for legal research.

Recommendation 40: Consider granting CLE credit for appropriate vehicles to increase audience and access to those who need credit.

Serving the law library versus the individual law librarian: Organizations that serve an “institution” as opposed to the “job, the profession, or the professional,” can position themselves differently than organizations committed to the individual. They can gain more credibility within the employing institutions by helping to serve organizational

needs. AALL appears to do a bit of both. While member education remains the first and highest priority, I feel there are advantages to designing an “institutional” line of programs and products specifically targeting law libraries. The curriculum for law libraries needs to be as carefully designed as the member curriculum.

Recommendation 41: Once the member curriculum is firmly established, investigate the feasibility of designing a core curriculum to serve needs of law libraries.

BUSINESS ISSUES RELATED TO PROFESSIONAL DEVELOPMENT ACTIVITIES AND COLLABORATIVE EFFORTS WITH CHAPTERS

Business Issues Related to Professional Development Activities

Program registration fees: The subject of appropriate registration fees for the regional programs was controversial. The feedback from interviews was equally divided between those that thought the prices of regional seminars were too high and those that didn't mention price but mentioned the low value. Several leaders were concerned that allocation of indirect cost and having staff on-site increased the registration fee beyond an acceptable range.

Many people in AALL are involved in price setting – you'll never agree. So how do you come up with a pricing strategy? Look at standard or market pricing mechanisms in the industry. In the Comparative Analysis, there were few regional seminars for comparison. Chapter offerings in all associations are priced very low in comparison to a National program, so that should not figure into the mix.

If AALL prices telephone seminars at the well-established industry average of \$149, then one-day live seminars have to be priced sufficiently higher to convey value. \$229-249 seems to be a range of price that doesn't trigger negative responses, ie, so high as to draw members away from the topic and value of the program to focus on the high cost. AALL can't afford to be engaged in the fight to the bottom of pricing. It certainly can't afford to give the programs away. Forget half-day programs, AALL can't afford them.

Recommendation 42: Price one-day regional seminars at \$249 and make sure they're worth every cent. Set the non-member fee at \$329 or more and offer a free membership to AALL with every registration.

Recommendation 43: Price telephone-web seminars at the industry standard of \$149.

Industry financial models: In the interviews, several leaders disagreed with the approach AALL was using to allocate overhead to program cost and the cost of having staff on site. Currently, AALL professional development programs are budgeted to include overhead and one half of the salary/compensation for the Education Manager position. According to standard education program business models (LERN), the following are ideal maximum percentages for a program to determine financial viability of the activity.

Income 100%
Promotion expense 10-15%
Production expense 40-50%
Total Direct Cost 50-60%
Operating Margin 40-50% (Indirect cost)
Administration 35% (with no more than 20% staffing salaries)
Net 5%

Recommendation 44: AALL should compare the financial profile of professional development activities to this standard industry model.

This model holds true for most associations. Additional contribution to overhead or profit usually comes from commercial or vendor funding. Using this model, it is reasonable to charge indirect costs up to 35% to the cost of a program including 20% for staff salaries. Extending this business model, a rule of thumb is that a staff position should produce 5 times the annual salary in program revenue to recover the 20%. According to this model, AALL is not out of line in charging a portion of salary to each program. The difficulty is the number of programs. According to this model, AALL would have to produce \$250,000 in revenue to absorb \$50,000 in staff costs. This translates to approximately 1,000 registrations: 20 seminars with 50 participants each or 10 seminars with 100 participants each.

Is it doable? Many organizations similar in size and structure to AALL have achieved such an ambitious goal through a combination of outstanding programming, commercial funding and strong marketing. The point of this exercise is to vividly demonstrate the challenge AALL faces in designing programs that can meet these goals. But it's equally important to remember the valuable indirect benefit these programs bring to the organization in terms of visibility, recruitment possibilities, and the opportunity to sell other products. Therefore, it will be very important to measure the conversion rate of nonmembers to members and carefully track products sold to participants. Although it's not nearly as easy to track the benefits from increased visibility and prestige these educational opportunities afford the association, it is important to try to establish some measure.

Recommendation 45: Agree upon measurements of success for tangible and intangible benefits of successful professional development programming.

Vendor funding: The profit in most association programming comes from vendor or commercial contributions. The downturn in the market affected all organizations and commercial funding tightened up considerably. Styles in funding have also changed. Commercial funders are more selective in what programs and organizations they fund, but, invariably, they will fund those programs that give them "the most bang for the buck," ie, reach the greatest number of potential buyers in the most prestigious way. Although most association staff know this, only the largest associations tend to consistently use an organized approach to funding.

To what extent are vendor programs drawing away from AALL regional programs? The vendor-sponsored program regional programs were mentioned in many interviews. There was concern expressed that the vendor refused to charge a registration fee even though each cancellation cost the vendor a great deal of money. AALL does not have control over these programs. They don't appear to be attributed by members to AALL. I believe they are undercutting your regional efforts and competing with what you are trying to do. If the programs continue, AALL must find a way to partner with this vendor so that the programs bear AALL's name and AALL must retain control over the content and presentation.

In order to be financially successful, the professional development curriculum will need a good deal of commercial funding. First, designate the staff person or persons that will be in charge of vendor funding. AALL must use a thoughtful, coordinated, long-term approach. Select vendor funding after you have established the full curriculum or plan. Don't unintentionally sacrifice vendor support of one program for another. Use the grant funding approach: Develop a plan, develop the proposal and shop it to multiple vendors. Select programs that attract vendor funding. Give them a good reason to work with you. Make AALL more attractive than other organizations. Also, since large vendors almost always maintain separate National and Regional promotional funds, investigate the feasibility of using regional or local funding for regional programs.

Recommendation 46: Develop a coordinated plan to secure ongoing vendor funding for the professional development curriculum.

Marketing: The feedback from interviews indicated that volunteers and staff felt there was great deal to do in the area of marketing. These were typical statements:

- The association has not marketed itself well.
- We need good PR and marketing all around.
- We need to make outputs of PDC more visible – get people to come because of the reputation of the product.
- We need help with marketing – we're working on this, so maybe we have it now.

I also heard that there were a lot of gatekeepers that had to be sold on the value of a regional program – the chapter leadership, then the member, then the boss. Value is the issue for AALL, not price. Marketing starts with a highly desirable product. Then, it is imperative to clearly establish the value of the program in promotional vehicles.

I understand that AALL has hired a marketing consultant. This is a very important initiative and deserves full organizational support. It is imperative that AALL construct an 18-24 month, strategic level Professional Development marketing plan. In addition, each program should have its own detailed plan. At a minimum, these guidelines for marketing should be observed:

- ✓ Use 10-15% of revenue of a program or product for marketing; this percentage can be increased up to 30% for new offerings.
- ✓ Each prospective customer should receive a marketing communication at least three times. Past attendees or frequent purchasers should receive additional communications.
- ✓ All marketing pieces must be designed to improve the image of the program and the association.
- ✓ Print-based marketing (brochure) is still the most effective marketing strategy for most programs. Follow up can be through email or fax.
- ✓ Pay very close attention to the copy to convince all readers of the value of the program. This includes bosses as well as potential participants. I think you need a lot of copy to convince buyers of the value (ideally, the value proposition) of the program. I also feel you need higher quality, more impressive brochures.
- ✓ For national seminars, the rule of thumb is to send the first brochure five months out, followed by two more mailings. This allows people to arrange travel and housing and time out of office. If the program is strictly local, the rule of thumb for mailing the first brochure is 14 weeks. These target dates do not include save-the-date announcements that are sent in addition to the brochure.

Recommendation 47: Establish and support an 18-24 month, strategic level Professional Development marketing plan. Develop and adhere to a detailed marketing plan for each professional development activity.

Collaborative Efforts With AALL Chapters

The views that Chapter leaders expressed in interviews were similar to views expressed by PDC and Executive Board members on a variety of issues. This is probably because the Chapter presidents with whom I spoke were seasoned leaders of the association. They also talked a great deal about the learning needs of their members and ways in which their members received professional development. The conversations vividly depicted the tremendous diversity of work environments and backgrounds represented in the membership.

Support requested from National: I asked Chapter leaders what AALL could or should do for them. In essence, they said they wanted help finding topics and speakers. As one said, “The issue is – we don’t have time – we would appreciate help.” Suggestions were made as to how AALL could improve current activities. One suggested, “More articles in *Spectrum*, use journals and the Web to get out quick and dirty, practical information.” Their responses were predictable based on my experience and research in other associations. Chapter leaders want to serve their friends and colleagues but they are hard pressed to find the time.

One Chapter leader commented that the relationship between the Chapters and National was getting better. He appreciated the efforts being made at Annual Meeting Chapter leader training. Another suggested that AALL needs to become more collaborative with Chapters. Related to this, one felt that partnerships with national and regional events

would work well, but only if staff does the work. Another felt that volunteers should not be doing work like meeting planning that is unrelated to the core business purpose of their employer who is paying for their time. The best volunteer activities would enhance the volunteer's job performance.

Several suggested that at least part of Executive Board visits could be reconstructed into professional development opportunities. As one Chapter president said, "They [Board members] all have expertise and could make themselves and the time they spend more useful."

Recommendation 48: Investigate the feasibility of enhancing Executive Board visits to Chapters to double as professional development opportunities.

Program pricing issues: I also probed program-pricing issues, looking for ways in which AALL could better market to Chapter leadership. Acceptable ranges for most programs were \$75-150 (of course they would like it to be cheaper). But, at the same time, they understood that there were many costs associated with a high-quality national workshop. Again, the issue of value was raised. They did not object to higher costs as much if the program delivered value for the cost. They understood that Chapter programs are always going to be cheaper. AALL leadership must understand that this is true for all associations. The cost of a typical Chapter program has little relation to the cost of a National-sponsored program.

Chapter Relations program: Based on my experience and in Best Practice research, I feel it is time for AALL to formalize a Chapter Relations program that includes components to strengthen Chapter education and publications/newsletters/web sites. This will establish a receptive climate for working with Chapters to bring regional conferences and workshops to their members.

It is important to develop the Chapter Relations program with the Chapters. The Association of Legal Administrators successfully embarked on such a plan several years ago and it has contributed significantly to the continued success of the organization. They began by creating a Chapter leadership 3-day summit in which organization issues were discussed and Chapter leaders concurred on major aspects of the plan.

Recommendation 49: Formalize a Chapter Relations program that includes components to strengthen Chapter education and publications/newsletters/web sites. This program should be designed in consultation with Chapter leadership.

As a start, these requests from Chapter leader interviews are the beginning of an excellent program:

- ✓ Partner with Chapters to help them produce excellent programming
- ✓ Share information in a deliberate and noticeable way – perhaps a quarterly newsletter to help them with education, newsletters, web site, etc.
- ✓ Update them on National activities, yes, but emphasize information relevant to them in their Chapter

- ✓ Send lists of top rated Annual Meeting speakers and contact information
- ✓ Send lists of top rated speakers from other organizations, particularly those close to home
- ✓ Compile and send best programs and speakers from other Chapters
- ✓ Send updates in the field – “news you can use” on equipment, procedures, legislation - to pop into their newsletters
- ✓ Send exceptional handouts and other materials to use as a basis for constructing good programs.

Chapter Awards program: As part of the overall program, establish a Chapter Awards program that truly reinforces and awards excellence in educational programming and communications, eg, Best Program, Best Newsletter, Best Web site. This helps Chapter leaders become better adult educators, which helps the Chapter and helps the individual on the job.

Recommendation 50: Establish a Chapter Awards program that truly reinforces and awards excellence in educational programming and communications, eg, Best Program, Best Newsletter, Best Web site.

Expectations of Chapter leaders: As part of the Chapter Relations program, engage Chapter leaders in setting up a system of mutual accountability between Chapter and National to strengthen Chapters and ensure equality of access to quality professional development. Chapter autonomy does not exonerate them from their responsibilities as key leaders of the association. Set up the expectations in terms of accurate and regular communication about the state of the association as perceived by the Chapter and local member. Give them tools to help them capture the information.

Recommendation 51: Set up a system of mutual accountability between Chapters and AALL to strengthen Chapters and ensure equality of access to quality professional development.

Chapter leadership training: Strengthen the Chapter Leader training that you have started at the Annual Meeting. Take great care to make this the best educational event of the year. It is your investment in the future of your organization. In order to ensure continuity and quality, staff should design and take part in the delivery of the training in consultation with Chapter and other appropriate leaders. The programs should help the Chapter leader understand and feel part of the National AALL. It should also supply training in leadership and planning skills.

Recommendation 52: Strengthen the Chapter Leader training that you have started at the Annual Meeting.

Chapter fundraisers: At a minimum, when scheduling a regional program, be certain that you are not conflicting with an important Chapter function. National associations often face the problem of perceived Chapter competition. I have observed that it is usually not a problem unless National is competing with an annual or other major

Chapter fund-raising event. It is imperative that National staff understand and respect the programs that Chapters sponsor to supply money for activities for the rest of the year.

Recommendation 53: Ensure that an AALL program does not conflict with a major Chapter event, particularly a fundraising event.

One other thought. Most Chapters report some level of educational programming. Some of it is reported to be excellent. Don't assume that you understand the level of service they are providing – it's probably different than you think and the impact on the programs designed by staff will be enormous. National staff often underestimate what is being produced on the local level. Close, consistent contact with Chapters will prevent this from happening.

ASSESSMENT OF PROGRAM PLANNING PROCESSES BY ACCREDITATION STANDARDS

Based on an assessment by association Accreditation Systems, the AALL Programs unit, overall, is a well-run unit of the association. Educational planning processes are thoughtful and well documented. The organization enjoys an exceptional reputation in the association community. It is recognized for the professionalism of its staff. It is characteristic of these staff to seek evaluation to find ways to improve their practices.

Recommendation 54: Maintain present levels of educational planning processes in all broad areas of the accreditation standards.

Recommendation 55: Maintain the stability of the education unit and its capacity to organize and produce high-quality continuing education. Continue to employ qualified individuals to administer the program.

Maintaining accreditation standards: It is commendable that an organization that is not required to undergo the accreditation process is willing to have its educational processes and products evaluated and audited. Because AALL is not required to adhere to any accreditation standards unless planners decide to provide CEU credit bearing activities, the instigation by staff to become an accredited provider through IACET is very commendable.

Recommendation 56: Continue to use IACET as a planning framework for professional development activities. This will ensure competent planning and encourage education practices consistent with top associations and providers of continuing education. It will also allow you to track continuing education credit for credentialing or other programs you may add in the future; you will be ready to track Continuing Legal Education and other credits should you ever determine to go in that direction.

Exemplary Compliance: A higher level of compliance, exemplary compliance, has recently been introduced by ACCME to induce a higher level of education planning in continuing medical education providers. The standards set by ACCME are so pervasive in the association community that their influence is soon seen in other accreditation standards. For example, many of IACET's standards are now very similar to ACCME's, particularly in the areas of needs assessment and learning outcomes assessment.

Recommendation 57: Consider moving educational planning and implementation to the higher or exemplary levels. A comparison between satisfactory compliance and exemplary practice can be found in the Appendix. (See ACCME Decision Making Criteria.)

Documentation: AALL shows an impressive level of sophistication in many aspects of planning and implementation. Particularly noteworthy are documentation including minutes and records of past activities; the minutes read as a clearly documented story of a well-managed system. AALL is to be highly commended for being able to produce, in

short order, an impressive amount of documentation to demonstrate the care and concern for quality that have gone into the planning process.

Recommendation 58: Maintain current levels of documentation, including minutes of planning meetings.

Staff-generated recommendations: As volunteers have less and less time and technology in associations allows staff to produce more information, it becomes more important for staff to tame the confusion by synthesizing the information it produces for volunteers into reports and, very importantly, recommendations that are easy to grasp and consider. The actual reports and documents can be included in report appendices for reference, but it is crucial that staff synthesize and interpret the information for volunteers instead of presenting volunteers with the separate reports and documents under the assumption that volunteers will take the time to read, interpret and synthesize the information to support their decision making. There was some evidence that staff have made the effort to do this, eg, strategic planning documents. But there were few recommendations in the records.

Recommendation 59: Staff should increase efforts to synthesize all information about members and programs into reports that interpret these data and result in concrete recommendations. These recommendations should be supported by data and included in well-constructed agenda books.

Commercial bias: Continuing education providers should ensure that activities intended to be educational in nature are free of any commercial bias that may come from a commercial sponsor or the faculty. This is a frequent problem when commercial funds are used to pay for a program or a vendor or consultant presents the program. Documents reflect that AALL recognizes the potential for bias and has a statement to that effect in place for the Annual Meeting.

Recommendation 60: Continue to promote a bias free independent and non-commercial approach in all educational activities. This will be particularly important if you ever wish to grant Continuing Legal Education credit for a program.

Learning objectives: The continuing education provider must create and communicate in clear and concise written statements the purpose of objectives of each learning activity so that the learner is informed before participating in the activity. This is often referred to as “truth in advertising.” The learning objectives must be based on documented learner needs and must be measurable.

Continuing education providers are increasingly being held responsible for proving that the education they provide actually influences the performance of the professional. “Outcomes measurement” is the common term. Procedures for measuring how well the learning outcomes are achieved are established during the program planning process.

The program objectives for most of AALL's programs appear, from evaluation data, to provide the learners with sufficient information. AALL is not required to adhere to accreditation requirements, and outcomes measurement is labor intensive and can be very expensive. At this time, I do not feel that the association needs to move to a greater measurement of learning outcomes than is practical with standard enhanced evaluation methods.

Recommendation 61: Maintain the current practices in evaluating participant satisfaction with learning objectives while monitoring changes in the association arena to greater emphasis on measuring learner outcomes. This may need to change sooner if AALL embraces IACET requirements.

Instructional Design: In the areas of content and instructional methods, all systems require that in all continuing education activities, subject matter and content are directly related to learning outcomes and content is organized in a logical manner to accomplish the outcomes. This also means that content is "chunked" appropriately, and flows smoothly through the learning experience. The instructional methods must also be consistent with learning outcomes and accommodate various learning styles. Ideally, learning interaction and assessments are utilized throughout the programs to reinforce learning, monitor learner progress, and provide feedback to learners.

The program evaluations show weaknesses in the instructional design of the programs. Because AALL programs do not typically use professional presenters, most faculty will require a great deal of support if they are to construct and deliver the highest quality workshops. This support must come from the staff who are well versed in instructional design of lengthy programs in which a great amount of complex content is delivered to diverse audiences.

Based on evaluation data, the staff should review the program content to make sure it is manageable in the allotted time frame; the flow of the material is logical; sufficient time is allowed for structured interaction between faculty and staff; there is an opportunity to use formative data to improve the program to address the needs of the specific audience; and the presenters are coached and critiqued to enhance their presentation skills. Since AALL, on the recommendation of legal counsel, provides on-site staff to oversee the program, there is a natural opportunity for the Education Manager to take a much stronger role in the design of programs and coaching of staff from inception to delivery.

Recommendation 62: Utilize the expertise of staff in instructional design and faculty support to enhance the quality of the professional development activities. Clearly articulate in the Education Manager job description and in the roles and responsibilities of staff and volunteers that staff are responsible for the technical education support in designing programs and working with faculty and for ensuring that the activities are well-designed and delivered.

Recommendation 63: As part of the instructional design of live programs, build in an opportunity for speakers to be rehearsed and critiqued prior to the pilot program.

Course materials: AALL program evaluations and interviews with Executive Board members indicated that professional development course materials could be improved. All continuing education providers should provide course or activity materials of such quality to indicate that adequate time has been devoted to their preparation and that they will be of value to the registrants in their practice. It is equally important that the image of the materials be professional and impressive because valuable materials will be handed round the learner's organization long after the program is over. This is invaluable promotion for the association.

Recommendation 64: Enhance the process used to design and produce course materials to ensure that they are well designed and prepared. Clearly articulate in Education Manager job description the responsibility for this function.

Needs assessment: Based on interviews and analysis of documents, planning group minutes in particular, it appears that professional development activity planning is not based on sufficient amounts of data regarding learners' needs.

Over the past few years, a metamorphosis has taken place in the business community from producer-centered to customer-centered. The same change has taken place in associations as they've moved from provider-centered to learner-centered.

In Best Practices associations, education is regarded and positioned as a major member benefit. When this aspect of the education is emphasized, the education is deliberately and thoughtfully designed to meet the informational and educational needs of the *majority* of the members. Because members join the association for information and education, education is intentionally used as a recruitment tool to attract new members and bond them to the organization.

The emphasis must be on what the members want, as opposed to what the leaders feel should be provided without adequate research to determine whether or not their ideas are on target. Effective associations recognize that if they don't satisfy their learners' needs, the needs will either remain unsatisfied or another organization will step in and become the preferred provider.

All educational systems require that the provider use needs assessment data to plan continuing education activities. Nowadays, the major systems are placing a much greater emphasis on needs assessment in an effort to strengthen continuing education. In most of these systems, the provider is required to use multiple sources of information to triangulate the learning need. Needs assessments data must be documented, reviewed and updated; each learning activity must originate from identified need.

In many systems the level of needs assessment required for exemplary compliance far exceeds basic levels: the provider must be able to demonstrate a consistent use of innovative and creative planning processes, with documentation that identified educational needs contribute to appropriate methodology and desired results for the offered activities.

AALL shows the same awareness of the need to move to a member-centered viewpoint as other savvy businesses have done. This is apparent in comments of the Executive Board, the PDC and the staff, and is attested to by the marketing and credentialing research that has been done to understand members.

What the minutes do not show is how the data are used. There is little documentation of member need for programs. There is insufficient discussion of the audiences for each of the programs – their differences as well as commonalities. There is no discussion about how each event may or may not satisfy the learning needs of various groups. There is some indication that faculty recognize the needs of the different audiences that may be present at a program. From the evaluations, it appears that this is sometimes sufficient and acceptable, but more often, strategies for addressing multiple audiences are not adding to the quality of the program.

Recommendation 65: Increase the level of needs assessment to understand learner needs; use the data to plan all educational activities.

Learner matrix: One way to effectively organize needs assessment efforts is to construct a learner matrix that graphically depicts at least the major member groups. It is beyond the scope of this evaluation to construct a full matrix, but I can make suggestions to get the process started.

AALL already distinguishes between major member groups based on employer type. These data were taken from the Gateways to Leadership brochure. The grouping and characteristics discussed below were also used in the focus group research.

- 40% (1,914) of the members come from private law firms or corporations
- 34% (1,647) of the members comes from the academic setting
- 15% (711) come from state, court and county courts
- 11% come from other settings.

These groupings are more specifically broken down by employer type (in order of number of employers represented by members)

- Law firm
- Law school
- Other state or municipal government
- Other federal government
- Association or non-profit organization
- Federal court
- Vendor/publisher/supplier to law libraries
- Independent/self employed
- Academic library (non law school)
- Private law library
- Public law library

From the results of focus groups and credentialing and market research, employer type appears to be the most important determinant of distinct learning needs. This is because

the context of each employer type is distinct from many or most of the others, so many requirements to perform the job may be unique. The body of knowledge needed to competently perform the job may not be entirely different from that of law librarians in other workplaces, but there are requirements that are essential and unique to each employer.

The other reason that it is important to distinguish between employment settings in understanding learning needs, is that each setting offers different levels of support and resources for continuing education and on-the-job training. Learning needs that are routinely met by the employer or the employing industry will affect the level of service required or desired of the association. The association will then serve other needs, such as networking with those from other employer types.

For example, the court-employed librarians interviewed seemed to have a great number of resources that were very specific to their employment setting provided at nominal rates on the local level. The librarians from the academic setting seemed to have more money and time to attend meetings than the law firm librarians. On the other hand, law firm librarians coming from large firms probably work in major metropolitan areas and have greater access to Chapter and local programming. The point is, those members who have resources and use them to pursue continuing education will have very different learning needs and preferences than those who don't. It changes their learner profile.

The next determinant will likely be experience in the field. The learning needs of novices in the field of library science, regardless of age, will be very different from those of experienced law librarians. Furthermore, those with prior library experience, but new to legal librarianship, will have different learning needs than novice librarians. There were no data to discern the cutoff point in terms of years when the novice becomes an "intermediate" law librarian, but each profession has learning ranges. The data do suggest that AALL serves a great number of highly experienced law librarians. AALL should pay very careful attention to satisfying the interests of the experienced group.

Academic background may or may not be an important factor beyond the novice years. After one or two years, those who have failed to learn the requirements on the job are usually weeded out. The novice without academic background probably requires remedial training, but this may be more appropriate for a library school. Beyond the second or third year of employment, the group without academic credentials may or may not have specific learning needs that are different from novices with academic credentials.

Degree of expertise should be considered; longevity in the field does not equal expertise. Generally, recognized experts in a profession exhibit specific characteristics that are different from other experienced practitioners. The experts are the most important source of information on the industry and usually have the most to contribute. Yet, most associations make no attempt to understand them or meet their needs and interests in continuing education.

Sometimes gender plays an issue, but that doesn't seem to be the case here, unless data suggest that male law librarians are being paid more or enjoy better work opportunities. In this case, female law librarians may have affective and other learning needs that are different than their male counterparts.

1. To recap, each major member group should be identified by:

- Employer type
- Experience in field and/or experience in this job
- Academic background
- Regular access to information and education to perform job (through geographic location, access to distance learning or funding for continuing education).

2. As the next step, a group of law librarians who represent each of the learner groups should determine the cut-off points where various career stages are usually reached that effect learning needs.

3. The next step is to assign the number of members to each group, accordingly.

The matrix begins to emerge (numbers are fabricated for illustration)

Experience level	Academic	Private/corporate	State, court and county	Other
Novice	100 members	500	300	300
Intermediate	500 members	900	200	100
Experienced	1,100 member	500	200	100

4. The law librarians representing each learner group determine finer distinctions that they suspect may influence learner need, eg, novice without academic credential versus degreed librarian.

The matrix takes on detail (numbers are fabricated for illustration)

Experience level	Academic	Private/corporate	State, court and county	Other
Novice w/o degree (1-3 yrs)	20 members	200	100	200
Novice with degree (1-3 yrs)	80 member	300	200	100
Intermediate (3-7 years)	500 members	900	200	100
Experienced (7-14 yrs)	700 members	400	100	75
Experience/exprt	400 members	100	100	25

Now we begin to see how many members in each group may have distinct learning needs. At this point, planners begin to have a real sense of how many people may have an interest in a specific topic or in learning a certain task.

5. Include all characteristics of the learners that may influence their continuing education participation. For example, if 30% of AALL members maintain Bar status, this group may require CLE credit from most of the programs they attend. This will certainly affect the success of programs you plan for them.

The construction of this matrix has been used only to illustrate the process. It may seem like a lot of work, but it is an invaluable tool for helping volunteer and staff education planners and faculty to “know thy audience,” the first rule of education planning.

Recommendation 66: Develop a learner matrix to help program planners understand the learning needs of all major groups of members.

Recommendation 67: Assemble, in the learner matrix, the wealth of data about the learners that has already been generated through focus groups and research reports; augment this information with the opinions of panels of law librarians representing all major learning groups.

Learner preference: Certain themes and phrases repeatedly emerged in focus groups, evaluations, and interviews with staff, PDC and Executive Board members as to their preferences in professional development activities. Based on my experience with other associations, the feedback “rings true” and I would hypothesize that the views would hold true for the membership at large.

Like all other professionals, law librarians are busy, and find it hard to get out of the office. Professional development activities must be timely – hot topics; of the highest quality; completely and immediately relevant to their jobs, ie, right on target, specific application at the level needed, hands-on probably necessary, when they need it; accessible in terms of convenience of delivery and cost. Most associations feel they are accomplishing this better than they actually are. This is also true for AALL. With enhancements, the programs and products will better serve members.

Programming for experienced members is a challenge for every association. In the research, many longtime members of the profession felt that the association was not meeting their advanced education needs. They found that programs were too basic, even if labeled advanced, and topics were “stale.” They cited need for more advanced training on issues that extend beyond core law library topics to topics such as technology and new tools of librarianship and business management practices. I believe this is a very serious issue. The real clue is that the senior librarians do not feel the programming is appropriate for them, but they sometimes send their staff. This appeared to be the case in the Professional Development workshops in which there were far fewer directors than staff in attendance. A focus group participant mentioned AALL-SIS roundtable with Lexis and Westlaw as being sophisticated and of high quality. It’s very important that you try to identify and analyze programs that are seen as sufficiently sophisticated so that you can determine what about the event is significant and replicate it. You leave the organization very vulnerable by not keeping the experienced librarian personally satisfied with the education provided.

There is a wealth of information we can borrow from other associations' experience. These are a few general rules of thumb in the industry that can augment data on member preferences:

- The most common sources for professionals to get information to do their jobs are journals, peers and other experts, and live programs.
- "Hot topics" are those topics that hit the professional in the pocketbook. They provide information you can't afford to be without whether it involves large expenditures or potential legal liability. They are "must know," not "nice to know" topics.
- The provider's reputation is important because it increases the edge that your program or product will be chosen as a reliable brand (not a waste of time and money) in a confused mix of alternatives.
- Networking is important, but not important enough to close the sale if the competing program more substantively helps the individual do the job. Also, over time, those with whom you value networking will be more likely to migrate to the other provider.
- An increasing number of professionals say they are attending fewer meetings requiring travel; the majority say they will probably only travel to one meeting per year.
- The preferred average length of a large conference is 3 or 4 total days.
- Factors influencing the decision to attend an out of town seminar, in order of importance, are ability to obtain current information; location; speaker reputation; meeting length; sponsor reputation; cost; dates; no local equivalent; opportunity to consult with desired colleagues; employer requirement.
- Reasons for not participating in meetings, in order of importance, include: takes too much time from work; meeting is too expensive; prefer to obtain information in another way; prefer different program format; prefer different provider.
- The most popular cities for United States professionals are: San Francisco, Washington DC, San Diego, Boston, Chicago, Orlando, New Orleans, San Antonio, Atlanta, and Baltimore.

Core competencies: The information on core competencies is an excellent source of data to add to the learner matrix. AALL should be highly commended for making the effort to identify core competencies required for successful performance in the profession.

The first step, then, in integrating the core competencies into the curriculum is to add each competency to the learner matrix. It is important to define, as exactly as possible, what knowledge or ability will be required to acquire the competency. For instance, core competency 1.1 is "Demonstrates a strong commitment to excellent client service." How will the commitment be demonstrated? When is the commitment strong enough and how does the librarian know, eg, is there a self-assessment tool available? How do you learn this level of client service skills? With this degree of analysis, the core competencies come to life as the foundation of the curriculum. To make this process easier, AALL needs to translate the competencies from demonstrated behaviors to the essential learning needed to demonstrate the competency: what one needs to know or understand before they can demonstrate the behaviors (as illustrated in 1.1 above).

As you begin using the core competencies as the foundation of learning need, be aware of some areas that may present problems. One of the assumptions of the credentialing survey was the gap between what is learned in formal training and what is needed to perform the task might be a source of learner need. As discussed above, once the professional is acclimated into the profession and has survived the early years, they may have learned everything they need on the job (or at least everything they think they need). Consequently, few members may take an interest in the association's efforts to provide the remedial training. This may or may not be AALL's experience. But the association should not assume there is a ready market for certain fundamental learning activities.

There is one other point of interest in relation to the core competencies. In the original research, each competency was measured by importance, overall proficiency, and formal training in that area. When determining how much interest a potential participant may have in continuing education on a topic, a general rule of thumb is that the competency must be more important than average and the proficiency in that area lower than average in order for the person to desire training. The presence of the prior formal training may or may not be important. Even if the importance of the competency is high and the proficiency is low, it may not matter if the practitioner is called upon to perform the task infrequently or could acquire assistance from a consultant or other source without looking incompetent. So, before determining that a potential learning need is large enough to merit constructing a learning activity around any one competency, it is important to analyze where the related tasks fall into the overall scheme of work. From the original survey, it appears that only a few items were both high in importance and low in proficiency ratings.

The credentialing study report recommended that AALL identify other models for advanced skills training used by groups where there is clearly an entry-level professional degree held by most individuals in the profession. It also suggested assessing the level of interest in these activities and the preferred delivery mechanisms. Sixty-one percent of those surveyed were interested in advanced credentialing. This is a fairly high response rate. This may indicate a market for 86% of the practitioners who have an MLS degree. The credentialing report mentioned there seemed to be strong support for programming at an advanced level with strong preference for technical skills, management and teaching. Subject matter experts, in constructing the learner matrix, can determine exactly what is desired in these areas for each of the major learning groups.

Recommendation 68: Determine how each core competency relates to the learner matrix. Determine what level of each competency each group needs and how best they can acquire the knowledge and information to achieve the competency.

On-going needs assessment: One of the issues or concerns that appeared in the PDC minutes and other documents staff was to develop an ongoing system to collect needs assessment data. In designing the ongoing needs assessment process, it's important to start with a common definition of needs assessment for all planners to use. For example, this is a commonly used definition: Needs assessment is the process of determining whether there is a gap between what ought to be and what is in terms of knowledge, skills

and abilities, then to determine if the gap is best addressed with the design and development of instruction or education.

The most common needs assessment methods used by associations are listed below. They are distinguished by subjective versus objective reports because subjective reports are usually considered less reliable since they are from the learners' point of view (as opposed to the employer's point of view or that of an impartial third party).

Subjective methods, ie, reports of learners

- Questionnaires/surveys
- Diary or Portfolio Assessment
- Program/product evaluation
- Interviews
- Critical Incident Reports
- Focus Groups
- Shadowing of program participants for the purpose of recording their impressions of the learning experience
- Futuring (eg, constructing the ideal scenario)
- Nominal Group process
- Delphi Process

Common objective needs assessments, ie, reports of observers:

- Key informants like PDC members
- Self-assessment exercises
- Pretest/posttest
- Environmental scanning
- Document analysis, eg, work samples
- Third party reports – eg, customer satisfaction surveys, performance reviews
- Supervisor reports
- Observation of actual or simulated performance

The ideal needs assessment plan integrates a variety of mechanisms depending on the type of information being sought. AALL already employs several of these methods. For example, information is generated through evaluations; focus groups have been used; the opinions of PDC and other committees are implicit in their choices (ie, they act on their opinions whether or not there is a discussion of the opinion) as key informants.

It becomes obvious in constructing a learner matrix which data are missing. So the next step is to determine the best means of collecting these data. Some of the information can come from items added to the evaluations. Staff can then choose the method that most easily collects the specific data needed to complete their knowledge of the learner group.

It is common for association education planners, both volunteer and staff, to call for an extensive survey of all members. Unless the group is starting an association from scratch and has no information at all to start planning, the large surveys can waste resources unless they are very carefully planned. AALL first needs to define, in as much detail as

possible, what they know (or think they know) about each major learning group. At that point, the survey of those members can verify the assumptions and fill in the gaps.

Recommendation 69: After determining what information is needed about each learner group, design a system for ongoing needs assessment to acquire the information.

Evaluation: Evaluation is another area of education planning that is rapidly changing. The impetus for the shift is the need to establish a positive learning outcome for the participants of a continuing education program. So the minimum requirement now is the typical satisfaction or exit survey completed by participants. Exemplary compliance requires that the program evaluation plan for each learning activity is established during program planning as the learning objectives or outcomes are determined. Educational activities must be evaluated consistently for effectiveness in meeting identified educational needs, as measured by practice application and or practice improvement.

Additionally, evaluation methods should be comprehensive which means that several types of evaluations may be needed to adequately assess how well learning objectives were met. Ideally, summative evaluations are used and analyzed based on the following minimum components: Did the learning experience and the instructional methods result in individual behavioral or performance change? Did the learners indicate that the learning outcomes were appropriate for the stated course/program purpose and for the learners involved? Was the program execution effective and efficient? Evaluation results should be regularly incorporated into program improvements.

AALL's current evaluation system is adequate for programs that are performing as expected and when experienced staff and volunteer planners interpret data. I suggest you continue with the same basic questions that you have been using so that you can compare future programs to past programs. However, I don't see enough evidence that the data are being used to improve subsequent programs.

It is very important that AALL begin to use some form of analysis to understand responses by various audiences. One rudimentary system that works fairly well with experienced programmers is to develop numerical indices to measure against the mean. This allows the program planner to discern relative weakness in aspects of the program. It also allows comparison between programs. Please note there is no sensitivity to the data – this is not a scientific approach – but it at least “gives us a clue.”

This is an illustration taken from the evaluations of the Copyright program.

Objective	11/21/98	3/20/99	5/13/99	10/28/99	2/15/00	10/20/00
Understand copyright law...	3.2	3.56	3.72	3.54	3.13	3.75
Apply learning to electronic media...	3.4	3.81	3.69	3.72	3.13	3.69
Identify areas...	3.4	3.46	3.78	3.44	3.57	3.75
Design solutions...	3.3	3.41	3.42	3.25	3.24	3.56
Mean of objectives	3.32	3.56	3.65	3.48	3.26	3.68
Overall mean	3.51	3.73	3.73	3.65	3.53	3.81

After computing the average for all categories of evaluation items, I compute the mean and compare the categories. For example, in column 1, the mean of the four objectives is 3.32. I then check to see which objectives were evaluated lower than the mean. This gives me a place to start to try to figure out why the some participants felt some objectives were better met than others. Verbal or written comments of participants usually tell the story. I also compute a mean for all similar programs, eg, Copyright courses. In this case the mean is 3.66. I then compare each program overall mean to determine the variability. In this case, 2 programs were below the mean and I would want to know why.

I compared course means for most of the Professional Development Workshops. The results were interesting.

Copyright: 3.66
 Training Internet Trainer: 3.42
 Managing Multi-location Libraries: 3.04
 Managing Solo Libraries: 3.24
 Space Planning: 3.2
 Finding the Law: Basic Legal Research: 3.72

Granted there were great differences between these courses including the number of times the program had been given and evaluated. Still, in almost every case, the comments and the index of individual evaluation items told a story of why the overall average of one was lower or higher than the others. Most association planners assume that a high numerical average is an indication of satisfaction with the program. This is not true. For one thing, it is unknown why some participants with strong positive or negative opinions do or do not complete evaluations and this certainly influences the index. It is also unknown whether or not people in a given population express their true opinions.

That is why I advise measuring against the mean. Law librarians may tend to always give high ratings on evaluations. It's up to the planners, then, to determine the difference between true high marks and low marks.

Again, this strategy is not scientific, but with practice, it provides interesting data to the planners. The important message here is that collecting and tallying evaluations is not enough. In fact, it's a waste of time unless you analyze and use the data to improve future activities.

AALL should also begin augmenting and collecting more data over the next year as a means of ongoing needs assessment. Demographic data to be captured on participant evaluations may include:

- Workplace, including size and other relevant information
- Number of years in the environment
- Number of years in the job
- What participant hoped to achieve by participating
- Preferred learning style
- If they do not complete process (eg, Listserv) why they fell away.

I also recommend comparing the responses of the various learner groups. For instance, planners should compare responses of the experienced law librarians from law firms with the opinions of experienced academic law librarians. I do this analysis with a simple Excel spreadsheet and find it invaluable in designing programs that serve multiple learning groups.

It is also important to formulate a report based on the evaluation data recommending concrete changes for improvements in programs and products. This comprehensive report should be available to all education planners. If data are insufficient to generate good recommendations for improvements, then other means should be used to collect the data. These can be follow-up phone or email interviews with participants from selected audiences, or in-depth debriefing with key participants; interview with faculty; in-depth post event evaluation to participants from selected audiences, and so on. It is particularly important that formative data be collected that can be used to shape ongoing programs.

Recommendation 70: Augment the current evaluation system in place to include greater detail about the preferences and characteristics of participants. Analyze the data for every activity; formulate concrete suggestions to improve all aspects of the design and delivery of the activity; measure the degree to which the recommendations resulted in improvements in subsequent activities.