BACKGROUND INFORMATION

As a result of the Education Summit held in the fall of 2005, an Education Summit Framework and Oversight Task Force was created. Its charge was to

- Flesh out the specific roles of the stakeholders: in particular but not limited to AALL, Chapters, SISs, Committees, Caucuses, and create a blueprint for fostering entrepreneurship between the stakeholders. Describe how the SIS's and the chapters will work together to plan and execute the appropriate visions from the Education Summit. Define the scope of the authority of various groups.

- Create model development for staffing and technology infrastructure.

- Create implementation plans for annual meeting program repackaging.

- Create implementation plan for grant funding and funding model, after Task Force #3 on Funding completes its work.

The Task Force was comprised of summit attendees and Board members. The work was divided among three subgroups, with the first three charges above becoming the charge for each group. The fourth group was to have worked with the final report of Task Force 3, however work on that has not been accomplished at this time.

Each group submitted a preliminary report that was shared with all of the Education Summit Framework and Oversight Task Force members, as well as the Board. The three reports from each group are appended to this report. While the approach and comprehensiveness of the reports vary, there is enough information that can be culled from each to develop recommendations.

RECOMMENDATIONS/MOTIONS

MOTION #1: AALL hire an Education Manager.

While each report has recommendations specific to its individual charge, there was one overriding issue discussed… an AALL Education Manager. (The phrase Education Manager is being used to represent the position, although the actual title of this position may be different.) Whether merely referred to within the report or discussed in relation to specific job functions, it is very apparent that this position is vital to the success of AALL's education future.

It is envisioned that the SIS's and chapters will play key roles in the future of AALL's continuing education. Current AALL staff is in place to handle logistics such as meeting details, however, AALL will need to hire an Education Manager to serve as the central person coordinating the Association's continuing professional education offerings outside the annual meeting. Programs will continue to carry the Association's name and a certain degree of responsibility and credibility must remain with AALL. It may prove even more crucial to have an education Coordinator on staff as we move towards more content input from chapters and SISs.

The reports point to specific job functions that could be handled by the Education Manager. These include, but are not limited to:

- participating in the development, with appropriate AALL entities, a new educational policy for AALL for approval by the Executive Board.

- promoting educational leadership through training, providing expertise on content development and methods of delivery; this could be on a case-by-case basis or through yearly training to representatives of each group and via information available on the web
- promoting AALL's educational opportunities to members and outside organizations

- coordinating educational opportunities with outside groups, such as CALI or other library organizations

● exploring and recommending (with AALL IT staff) appropriate technological advances to provide forums for continuing education, including the repackaging of Annual Meeting programming

● overseeing the educational calendar and speaker's bureau

● providing educational structure following the AALL Competencies of Law Librarianship.

● working with representatives of the SISs and chapters on the future development of the AALL Continuing Professional Educational program

The person in this position should possess a specific set of skills, including but not limited to:

● adult learning expertise

● a certain level of technological skills in the area of educational program delivery

● familiarity with librarianship highly preferred

Financial Implications: The AALL budget includes a line for this position. Depending on the current market trends, the amount allocated may need to be adjusted.

Additional recommendations were suggested by each group, however without the benefit of an AALL Education Manager's expertise, it is premature to implement any of the recommendations. The reports could serve as a starting point and background information for the person in this position.

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MOTION # 2: Appoint a Continuing Professional Education Special Committee for a one year period to work with the AALL Education Manager.

The Education Summit was highly successful, in large part because it exhibited a commitment by AALL to address the issues of continuing education for law librarians. Hiring an Education Manager is the first major step in accomplishing this goal. The person is this position, however, would not have had the benefit of attending the summit or of having been a part of the discussions leading to the task force reports.

To this end, a Continuing Professional Education (CPE) Special Committee should be appointed by the Vice-President/President-Elect for a one year period to work with the Education Manager. This relationship would enable the Education Manger to tackle the issues immediately, using the knowledge base of the Special Committee as a source of information and assistance.

The charge of the Continuing Professional Education Special Committee would include, but not be limited to:

Working with the Education Manager

● develop for Executive Board consideration at the Spring 2007 Board meeting a proposed update of the AALL Professional Development policy

● prepare a Members' Briefing for AALL Spectrum on the new continuing education program and to publicize it to the AALL membership in other appropriate ways

● consider education proposals received under the new funding model

● survey other professional associations to determine their level of continuing education, particularly their use of technology (webinars, podcasts, etc.)

● recommend to the Executive Board how the work of the CPE Special Committee should be carried on after July 2007

AALL EDUCATION SUMMIT CHARGE NO. 1

CHAPTERS

1. **Role**

- **Delivery**

    - Identify and procure venues for programs
    - Work with program coordinators to schedule programs
    - Promote programs through chapter listservs, web sites and word of mouth
    - Partner with local groups and (local, regional and when possible national) vendors for funding and venues
    - Hands-on training
    - Forge regional, multi-chapter programming efforts.

- **Program and content development**

    - Monitor local programming needs
    - Develop programs and make them known to the rest of AALL
    - Tap into local resources – speakers, organizations, etc.
    - Encourage chapter members in developing programs and communicating programming needs
    - Identify programs from Annual Meeting or other chapters that could be done locally
    - Partner with local library schools to develop law library curriculum and tap resources for programs

2. Fostering initiative

- **Recognize the independence of chapters** – present programming initiative as an opportunity for chapters, not a mandate
- **Emphasize the vital role chapters play** in the success of professional development programming. Foster idea that AALL programming is an **opportunity to revitalize some chapters** through renewed purpose, expanded resources and better chapter events
- **Provide resources** – funding, ideas, speakers, technological assistance, connections with SIS's and other chapters

- **Offer more focused programs** that chapters can't do themselves because their own programs have to have a broader appeal – look for gaps and niches in programming
- **Package programs** so that more than one could be held on a given day with appeal to different groups
- Make sure that AALL's programming does not erode chapters' ability to raise funding by arranging for **revenue sharing** – perhaps a surcharge on the base price of the program.

3. Cooperation between chapters, SIS's and AALL

Appoint a chapter liaison who would be a chapter executive board member. The liaison would be responsible for coordinating with AALL and SIS's in getting professional development programs to the chapters

- **AALL**
    - Work with AALL HQ to obtain resources – funding and expertise
    - Contribute to AALL's professional development calendar

- **SIS's**
    - Coordinate on a formal level through the chapter liaison and on an informal level through chapter members of SIS's.
    - Content development - work with SIS's to develop programs that would work on local level. Offer successful programs for presentation elsewhere
    - Schedule conference calls or face-to-face meetings (at Annual Meeting) at least once a year with SIS's, other chapters and AALL staff to review efforts, share information and plan for future programming

AALL Education Summit Task Force #1
AALL

1. Define Role of AALL

- Promote leadership in all levels to be part of career development
- Provide expertise on technology & leverage technical capacity to deliver content
- Coordinate programs, information and offerings from a broad range of sources
- Develop and maintain an Educational Calendar and Speakers Bureau
- Sponsor/partner with other organizations for allied programming
- Provide structure for the competencies or master plan for career development for law librarians

AALL as a national professional association is the parent body for all of the other entities at the table (SIS's, caucuses, committees, and chapters). It therefore must play a critical role in coordinating, supporting and marketing the professional development work of these groups as well as looking at the big picture from a national perspective.

Although financial and personnel resources are not unlimited, AALL does have a permanent headquarters staff with expertise that can be directed towards this important goal as well as a technical infrastructure not immediately available to the other groups.

2. Plan for Fostering Initiative by AALL:

- Hire a full time Education Program Officer to coordinate career development efforts at the national level
- Repackage annual meeting materials for distribution to chapters/SIS's for their uses at the local level
- Develop and maintain an Educational Calendar and Speakers Bureau with content to be provided by members
- Develop and provide "train the trainer" programming at the annual meeting
- Provide limited seed money for content development in the form of grants to chapters and SIS's
- Develop expanded leadership-specific training and sequences in support of the strategic directions. Expand the core competencies for a leadership category.
- Identify and implement technology to offer web-based programming that can also be offered to support Chapters and SIS's
- Create a Career Development Council, similar to the SIS and Chapter Presidents Councils, to be comprised of one SIS and Chapter representative specifically charged as liaison.
- Expand funding to support newly emerging continuing education opportunities

3. Plan for Cooperation between Stakeholders, AALL and chapters, AALL and SIS's, etc.:

AALL:

- Create a Career Development Council, similar to the SIS and Chapter Presidents Councils, to be comprised of one SIS and Chapter representative specifically charged as liaison. This would facility cross communication, not just communication up to HQ.
- Develop and maintain Education Calendar and Speakers Bureau
- Establish and fund a seed grant program for content development by chapters and SIS's
- Provide logistical support and consultation with chapters to help present meetings
- Provide technical expertise and partner with others who have expertise not located in-house for both annual meeting repackaging and chapter and SIS programming. Ensure adequate funding.

Special Interest Sections:

- Have a designated professional development liaison with AALL and Chapters
- Perform needs assessment of members to identify programs of timely interest. Communicate this to chapters and to AALL for program planning
- Contribute to Education Calendar and Speakers Bureau
- Coordinate with chapters to identify possible speakers for regional programs
- Develop programming that addresses timely topics to present at the regional and local levels as well as the national level at the annual meeting.

Chapters:

- Have a designated professional development liaison with AALL and SIS's
- Perform needs assessment of members to identify programs of timely interest. Communicate this to SIS's and to AALL for program planning
- Contribute to Education Calendar and Speakers Bureau
- Assist in securing facilities for programs
- Publicize "imported" programs among members
- Coordinate with neighboring chapters to present regional meetings
- Coordinate with SIS's to identify possible speakers

TF #2 Subgroup on Staffing and Technology Infrastructure Final Report
February 3, 2006

Members of the Subgroup: Kit Kreilick(chair), Kathy Carlson, Sally Holterhoff, & Steve Weiter

Executive Summary:

Three of us reviewed the previous reports concerning AALL's professional development program, which are posted on AALLNET. Two of these, the 2001 Sara Cameron May report and the 2002 Professional Development Committee (PDC) report are found at: www.aallnet.org/prodev/prodev_evaluation.asp. A third, the 2003 Career Development Task Force (CDTF) report, is found at: www.aallnet.org/committee/career_report.pdf . It was proposed that what we–should do next is canvass other similarly situated organizations to see what kinds of professional development they offer and how they address the staffing and technology infrastructure. We then started developing a list of organizations to contact and questions to ask, and asked for Task Force #2 feedback on both lists. We received no feedback and ran out of time before we were able to gather any data; our recommendation is that this be the next step.

Our summary of the summaries appears below along with a list of possible organizations to contact and questions to ask.

Summary of previous reports:

In the earlier reports we reviewed, most of the staffing concerns are directed towards education planning and program development. That's certainly where a lot of the May recommendations are focused and where the PDC report put its emphasis. The CDTF report recommends that there be headquarters staffing to carry out the programs, but does not delineate the nature of that staffing other than to reference back to the earlier reports.

May provides the most specific recommendations for the types of staffing and skill sets required for a professional development program. It seems plain that adult education planning and program development were her chief concerns, and May thought we would need two positions to handle those functions adequately. Given our previous inability to pay for one position without a vendor grant, we suspect two is unrealistic at the start. However, there may be an argument that having a two-person team at the beginning will give the program the jump start it needs to get credibility and maintain momentum.; the experience of other organizations might guide us here.

An issue that arose late in our exchanges is whether we really need program development staff at headquarters if the consensus of the Education Summit is that content development should take place at the chapter and SIS levels. Even if we agree there's a need for a professional education coordinator on staff, that need will have to be weighed against the other functional needs we require as an association if we do not have sufficient financial resources. The financial piece will clearly be a critical one.

As summarized from May's report, the other desirable staff skills needed/ tasks to be addressed are:

Marketing/Communications
Meeting Planning
Technological Delivery of Distance Learning Programming
Finance and Fund Development

In some cases these skills/tasks may already be present in or handled by existing headquarters staff. It's not clear if the existing staff could handle the additional demands of a professional development program on top of what they already do.

Technology infrastructure is trickier. All the reports refer to multiple program delivery media and to web-based programs so some kind of technology infrastructure (in-house or outsourced) is assumed, but not spelled out or recommended in any detail. What we need for technology infrastructure depends largely on what kinds of programming we want to support, so the previous reports did not focus on specifics for the technology piece. We will need to look elsewhere for models.

There was some discussion in our subgroup about not 'micro-managing' the allocation of staff responsibilities. The chair was originally concerned that we know what the current staffing is so we'd see what it took to change it to support a professional development program; after further reflection, the chair realized that all we can and should do is recommend required functions and skill sets, offer other organization job descriptions as models, and let the Board, the AALL Executive Director and Headquarters staff take it from there.

Other Models:

We recommend that the association canvass some similarly situated organizations to see what types of staffing and technology infrastructure they provide for their professional development programming. Finding out what other comparable groups offer and how they support it is a logical next step. If we are going to do a canvass, we need to agree on a list of organizations to contact, and a list of questions to ask. Our initial plan was to start this survey once we had gotten feedback from other task force members about the questions to ask and the organizations to contact, but we did not receive any comments and ran out of time.

The subgroup's current lists follow.

1. Organizations to contact:

Other library organizations:

SLA,
MLA

ARL
ACRL
LITA
Other ALA divisions?

Non-library, but related organizations:

ABA
ARMA
Assn of Legal Administrators
CALI
Legal Marketing Assn.

2. Questions to ask:

Number of members being served

Nature of the professional development program-types of programs and services offered

Who develops program content?

How many and what types of staff are devoted to supporting professional development? What do they do?

Org chart/reporting structure?

Job qualifications sought and job descriptions

Technology infrastructure for prof. development?

Are any aspects of the technology infrastructure outsourced?

If technology infrastructure is outsourced,
-who are the suppliers?
-how satisfied is the organization with the services supplied?

Kit Kreilick
Chair of the Subgroup on Model Staffing and Technology Infrastructure, Education Summit Task Force #2

AALL EDUCATION SUMMIT TASKFORCE NO. 2, CHARGE NO. 3
"Create implementation plans for annual meeting program repackaging."

AALL

Make Annual Meeting Programs available for repackaging.

1. Work with third-party vendor to convert programs for delivery in alternate formats
   a. create liaison within AALL to spearhead efforts to identify possible vendors (i.e., CALI[1]). The liaison (or assisting committee) would:
      i. identify possible media formats that can be used by members (i.e., podcasting, mp3 files, html, dvd, etc.). This could be accomplished through member surveying or industry standard inquiries.
      ii. determine viability of current media practice (i.e., cd/videotaping). This could be accomplished through member surveying or industry standard inquiries.
      iii. make some programs available on AALLNET without additional cost (i.e., keynote programs, SIS and chapter-sponsored programs).
      iv. make other programs available via AALLNET on a pay-per-program basis.

2. Work with AMPC and/or Educational Coordinator to make programs available to other entities

   a. work with Annual Meeting Program Committee to secure necessary permissions from program proposers and presenters for alternative delivery methods
   b. create database of programs with interested coordinators/speakers contacts for potential programming decisions by local and regional entities
   c. create database of outlines/scripts (etc.) of annual meeting programs (provided by interested coordinators/speakers) for use by local and regional entities in creating versions of successful annual meeting programs

3. Work with AALL entities to ensure success

   a. AALL HQ (possibly through new educational position) provide necessary marketing to promote programs availability

CHAPTERS and SIS

1. Promote availability of annual meeting programs (via alternate formats) to members.

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[1]John Mayer, Executive Director of CALI, recently forwarded a proposal to the AALL Executive Board offering to assist with selected aspects of AALL's professional development program, including use of podcasting, blogs and use of CALI lessons.