

AALL Board Strategic Planning Process

November 2003

The AALL Executive Board, executive director, and senior staff met in retreat to consider: 1) What it Means to be on a Strategic Board: When, Why and How to Keep Your Focus Strategic; 2) The Life Cycle of Not-for-Profit Organizations: Implications for AALL and for Board's Governance Style; 3) Board Members as Change Agents: What it Means for Board Behavior, Skills Sets, and Comfort Level; 4) An Exploration of Strategic Planning: Designing an Appropriate and Fluid Planning Process for AALL; and, 5) The Mega Issue of AALL's Educational Needs Assessment: What is the Future of AALL's Education Program? Where should it focus and how should it be structured and still be affordable? The session was facilitated by Cate Bower, CAE, principal partner of Tecker Consultants, LLC. At the meeting each AALL Executive Board member was given a copy of Glenn H. Tecker, Jean S. Frankel, and Paul D. Meyer's, *The Will to Govern Well: Knowledge, Trust & Nimbleness* (American Society of Association Executives 2002) to read prior to the April 2004 meeting.

April 2004

The AALL Executive Board, executive director, and senior staff met in a planning day to consider 1) ways to continue to transition board focus to a more strategic approach and 2) to plan the process of strategic thinking that would be used to update the existing strategic plan. The session was facilitated by Cate Bower, CAE, principal partner of Tecker Consultants, LLC.

May-November 2004

The AALL Executive Board identified a number of documents that would provide a general environmental scan of the profession of librarianship, the legal community as a whole, information management, and publishing trends. Links or citations to these documents were posted in the AALL Executive Board section of AALLNet for all of the board to read (see Bibliography).

AALL members' thoughts were solicited in a variety of venues. At the AALL Meeting in Boston, there was an open forum soliciting members' views following the second business meeting. Subsequent to the Annual Meeting, there were online discussion groups developed for each of the major type special interest sections (academic; private; and state, court, and county); there was a set of questions posted on AALLNet that every member was encouraged to answer; and there was a discussion forum ("At the Water Cooler") where members could share their thoughts informally.

The AALL Executive Board decided to broaden its perspective by soliciting input from a cross section of stakeholders of law libraries and law librarians. It did so by commissioning qualitative research across five key groups: 1) legal publishers; 2) the courts; 3) law schools; 4) law firms; and 5) related associations. Using a questionnaire prepared by Tecker Consultants with input from AALL leadership, Cate Bower, CAE, principal partner of Tecker Consultants, who facilitated the AALL Executive Board's planning process, conducted a total of 12 interviews between September and November of 2004 with representatives of these stakeholder groups. The interviews served to elicit the stakeholders' ideas about the challenges and potential roles for both law libraries and law librarians, as well as the part AALL might play in helping create those roles. Interviews included asking the specific questions outlined in the questionnaire along

with extemporaneous conversations as a result of issues that were raised. Those interviewed were chosen from a list of potential participants created by the AALL Executive Board.

November 2004

The AALL Executive Board, executive director, and senior staff met in retreat where the actual strategic thinking process was undertaken. Based on the comments received from members and stakeholders and the information gleaned from the background documents about the future of the profession and the world in which law librarians function, the board developed what it felt to be the core ideology and envisioned future of AALL. Board members identified some mega issues facing the Association and its members and worked to establish goals and conditions to address those issues. The session was facilitated by Cate Bower, CAE, principal partner of Tecker Consultants, LLC.

December 2004

Cate Bower, CAE, principal partner of Tecker Consultants, LLC, supplied the AALL Executive Board with a summary report of the conclusions it had reached at the November retreat as to the core values of AALL and the major goals and objectives it wished to address in the next few years. Board members were asked to respond as to whether they agreed or disagreed with those conclusions and to add further thoughts and comments.

January 2005

Taking the summary report and the comments received from the AALL Executive Board, a board committee and the AALL executive director met to prepare a draft set of Strategic Directions. To assist the subcommittee with a perspective representing the needs of the Association's next generation, an involved member from the appropriate age demographic was invited to provide input.

February to April 2005

The draft set of Strategic Directions was provided to the AALL Executive Board for review and discussed at the April Board meeting.

July 2005

The final draft will be ratified by the AALL Executive Board at its July meeting.

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