

**PROMOTING THE AALL PRINCIPLES AND STANDARDS FOR LEGAL RESEARCH COMPETENCY TASK FORCE  
FINAL REPORT  
June 13, 2014**

**A. INTRODUCTION  
B. RECOMMENDATIONS FOR ACTIONS**

**A. INTRODUCTION**

**a. BRIEF HISTORY**

- i. There have been three Task Forces appointed to work on various aspects of the AALL Principles and Standards for Legal Research Competency.
  1. The first Task Force titled Law Student Research Competency Task Force was appointed by President Catherine Lemann in 2010.
  2. The second Task Force titled Law Student Research Competencies Task Force was appointed by President Joyce Manna Janto in 2011.
  3. The third Task Force titled Promoting Legal Research Principles, Competencies and Standards was appointed by President Jean Wenger in 2012 and presented its Final Report (this report) to the Board at the Summer Board meeting in 2014. Following the first report of this Task Force in 2013, the Board approved the AALL Standards and Principles for Legal Research Competency (PSLRC ) and extended the Task Force until July 2014, the name of the Task Force was updated to Promoting the AALL Principles and Standards for Legal Research Competency Task Force, and the charge was revised.
  4. Links:
    - a) Link PSLRC  
<http://www.aallnet.org/main-menu/Advocacy/legalresearchcompetency/principlesstds>
    - b) Link to the Report of the First Task Force:  
<http://www.aallnet.org/Archived/Advocacy/AALL-Recommended-Guidelines/Student-Research-Principles.pdf>
    - c) Link to the first Report of the Third Task Force:  
<http://www.aallnet.org/main-menu/Leadership-Governance/committee/cmte-final-reports/2012-2013/lawstudentinfotf.pdf>

**b. PURPOSE and CHARGE:**

- i. **Purpose:** To establish the AALL Principles and Standards for Legal Research Competency as the “gold standard” of research competency within AALL and for the legal community.
- ii. **Charge:** The Task Force will:
  1. Continue to develop implementation plan to establish the PSLRC as the “gold standard” within AALL and for the legal community;
  2. Develop training and best practices for AALL members to share the PSLRC to their institutions and other stakeholders;

3. Implement strategies, including educational tools and best practices, to promote the "gold standard" to targeted external audiences and at the most appropriate venues

**c. WORK OF THE TASK FORCE**

1. Charge #1 - Continue to develop implementation plan to establish the PSLRC as the "gold standard" within AALL and for the legal community;
  - a. PSLRC Information Center on ALLNET:
    - i. The Task Force members and AALL Headquarters staff have launched the PSLRC Information Center on ALLNET. Here is the direct link: <http://www.aallnet.org/main-menu/Advocacy/legalresearchcompetency> The information center can also be accessed by the Advocacy Pull-Down tab. Please take a look at the information center. It is designed to promote the PSLRC to law firms, law schools, courts, and bar examiners. We have included a screenshot at the end of this report.
      1. The content on the information center is expected to grow exponentially. It is hoped in the near future that content will be added to weekly.
        - a. Some possibilities include
          - i. Short videos or other types of e-learning and which will be targeted to priority stakeholders.
  - b. Webinars:
    - i. A member of the Task Force (in her individual capacity) participated in a LexisNexis webcast in February titled Preparing Students for Practice - Employer Expectations for Legal Research Skills. Information to access this webcast can be found on the PSLRC information center. Here is the direct link: <http://www.aallnet.org/mainmenu/Advocacy/legalresearchcompetency/learn> Approximately 100 people attended the webinar.
    - ii. Some of the members of the Task Force (as individuals) are preparing to do a webinar for the AALL community in the fall.
  - c. Articles:
    - i. Two members of the Task Force have published an article in Spectrum (online) titled There's a Competency for That! Standards for the Successful Researcher. Here is a

link: <http://www.aallnet.org/main-menu/Publications/spectrum/Spectrum-Online/Competency.html>

- ii. Members of the Task Force are also working on an article for NALP's newsletter.
  - iii. There has also been the beginning of the preparation of brief articles about PSLRC suitable for inclusion in stakeholder newsletters. These articles will be placed on the information center.
- d. Conferences:
- i. Two members of the Task Force (in their individual capacities and sponsored by their individual institutions) spoke at the 2013 Professional Development Institute (PDI), co-sponsored by NALP and ALI CLE (formerly ALI-ABA) and in collaboration with the Professional Development Consortium. The Institute was held in December in Washington, D.C. The PDI delivers timely and substantive programming for all involved in lawyer training and professional development.
    - 1. One of the takeaways for the program attendees was the knowledge of the PSLRC and of the information center. The information center is designed to provide ideas on how to implement the PSLRC in different environments.
    - 2. One of the takeaways for the Task Force members was meeting so many interested conferees including NALP leadership.
  - ii. One member of the Task Force (in her individual capacity) participated in the discussion about legal research as a core legal skill with the 2013 Summer Conference on Legal Information.
  - iii. Two members of the Task Force (in their individual capacity) filled out the request for proposal to speak at the NALP Annual Education Conference about the PSLRC. Unfortunately, their proposal was not accepted.
  - iv. The Task Force has continued to track possibilities of individuals speaking in their individual capacity at other stakeholder meetings.
- e. Activities at San Antonio:
- 1. The Task Force submitted a program to the Program Committee but it was not accepted.

2. The Task Force submitted a proposal for a Poster Session which was accepted.
  3. The Task Force submitted a proposal for a Coffee Talk session which was accepted.
  4. The Task Force is also planning to set up a table in the Activity Area.
  5. The Task Force has designed a brochure and bookmarks to give to interested attendees and to put on the PSLRC information center.
  6. The PSLRC brochure will be distributed at the PLL-SIS Summit and is scheduled to be included in the discussion during the session, *Could Your Lawyers Pass a General Counsel's Research Skills Audit?*
- f. Talking Points:
- i. The PSLRC has become a talking point in AALL's interaction with related and affiliated organizations.
2. Charge #2 - Develop training and best practices for AALL members to share the PSLRC to their institutions and other stakeholders;
- a. Suggested uses:
    - i. Members of the Task Force have been piloting some suggested uses of the PSLRC in their own environments and these will be used to begin populating the information center.
    - ii. The plan is also to engage all interested members in providing their success stories to all.
    - iii. The suggested practices associated with relevant standards and competencies will be added to the information center.
    - iv. The Task Force has explored launching a My Communities discussion venue to determine if it might be a useful way for those in AALL to discuss best practices in a non-public environment.
3. Charge # 3 - Implement strategies, including educational tools and best practices, to promote the "gold standard" to targeted external audiences and at the most appropriate venues
- i. Stakeholders;
 

The Task Force has developed a lengthy list of potential stakeholders. The Task Force chose to focus on the National Conference of Bar

Examiners and NALP due to the established relations with those groups.

1. The Task Force's plan is to individualize the promotion to the stakeholders.
  2. The Task Force has been working on targeted messages for specific audiences.
    - a. The information center includes targeted messages to all stakeholders.
  3. There are plans to engage all stakeholders in sharing best practices of promoting the gold standard.
    - a. Specifically, members of the Task Force have been piloting some possibilities in their own environment.
    - b. The plan is also to engage all interested AALL members in providing their success stories to all.
4. Recommendations
- a. To establish the AALL Principles and Standards for Legal Research Competency as the "gold standard" of research competency within AALL and for the legal community.
    - i. All implementation strategies must be focused on information and advocacy for the broad and deep incorporation of the PSLRC by all stakeholders.
    - ii. To be successful, the strategies need to become operational within AALL Headquarters over the next few years.
    - iii. The Task Force recommends liaisons with with appropriate SISs, possibly including RIPS, PLL, ALL, and SCCLL. For example, the RIPS SIS has newly created a Legal Research Competencies Committee.
    - iv. The Task Force recommends appointing Representatives to critical stakeholders.
    - v. As part of the implementation, the Task Force acknowledges the necessity for periodic review and possible revisions of the PSLRC for currency, but also values their stability as the "gold standard" for research, particularly as AALL partners with other organizations on their adoption and implementation.
  - b. Specifics:

- i. Special Committee:
  - 1. There now have been three Task Forces and the formation of a 2 year Special Committee is the next step.
  - 2. The Task Force has put together a working memo for the Special Committee that provides more information about our activities which should be of use to the Special Committee in their process. Continuity is critical in this endeavor.
- ii. Representatives to Stakeholders:
  - 1. Since many of the stakeholders are outside our organization, it is important that there be a Representative to these organizations.

**B. RECOMMENDATION FOR ACTION**

- a. **Motion. That the Executive Board approves the formation of the Legal Research Competency Special Committee for a two year term.**

The Task Force recommends based on our discussions and experience the following:

- 1. Membership:
  - a. 5 members including the Chair
  - b. Some of the Committee members be drawn from the last Task Force for continuity purposes and from any SIS committees that might also be addressing legal research competency issues
  - c. That AALL’s Representatives to NALP - The Association of Legal Career Professionals and the ABA Section on Legal Education and Admissions to the Bar be appointed ex officio members of the Special Committee
- 2. Charge of this Committee:
  - a. Finalize the recommendations for the implementation plan to establish the PSLRC as the “gold standard” within AALL and for the legal community which will include a plan to operationalize at Headquarters many of the activities ;
  - b. Continue to develop and implement training and best practices for all stakeholders and especially AALL members to share the PSLRC to their institutions and other stakeholders;
  - c. Continue to develop and Implement strategies, including educational tools and best practices, to promote the "gold standard" to targeted external audiences and at the most appropriate venues;

- d. Establish a process and timeline for periodic review and possible revision of the PSLRC. The Board approved the PSLRC in July 2013.

Continuity:

For the Special Committee to be effective, the Task Force believes that the Special Committee must seamlessly continue and build upon the legal research competency initiatives within and outside of AALL. One critical factor that will ensure a smooth transition and uninterrupted communications with all stakeholders (internal and external) is the composition of the Special Committee. The Task Force recommends that some appointments to the Special Committee be drawn from members of the last Task Force and from any SIS committees that might also be addressing legal research competency issues. Likewise, the Special Committee's ability to strengthen ties to external stakeholders, such as the ABA, Section on Legal Education and Admissions to the Bar and NALP- The Association of Legal Career Professionals, would be considerably enhanced by including the AALL Representatives to those groups as *ex officio* members of the Special Committee. Such a committee composition will enable the Special Committee to begin developing and implementing initiatives and planning for the future from day one, thus avoiding the adjustment period typically encountered during transitions.

Respectfully submitted,

PROMOTING THE AALL PRINCIPLES AND STANDARDS FOR LEGAL RESEARCH COMPETENCY TASK FORCE

Sally Wise, Chair  
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Jean Wenger, Board Liaison  
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# Legal Research Competency

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The American Association of Law Libraries asserts that the *Principles and Standards for Legal Research Competency* are applicable and desirable across the legal profession and beyond the law school experience. AALL invites librarians, law schools, law firms, continuing legal education providers, and relevant organizations in the legal profession to engage in the implementation of these *Principles and Standards* in meaningful ways that will result in more competent, effective, and efficient legal research, thus impacting the bottom line and service positively. This section offers opportunities to read about legal research competency, to share assessment examples and best practices.

The challenge to each entity within the legal profession – including law schools, CLE providers, bar examiners, paralegal and law office administrator associations, law firms, and others – is to embrace legal research competency as a necessary skill and to incorporate these standards and competencies into its own performance measures.

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## Outreach



- For law firms
- For law schools
- For courts
- For bar examiners

## What's New



- Meet with Members of the Legal Research Competency Task Force
- Legal Research Competency Poster Session
- Legal Research Competency Coffee Talk
- Associates Research SkillsALL-SIS New
- LLAGNY, Practice-Ready Graduates

## Action Center



- Share Your Ideas
- Connect
- Read
- Learn
- Promotional Brochure

### Inside Legal Research Competency

- [The Case for Competency](#)
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