

Body of Knowledge Development Report to the Board – November 2017 Meeting

The Body of Knowledge Development Special Committee met over the last year to develop new standards for the knowledge and abilities required by today's legal information professionals. This work will serve as a blueprint for future professional development opportunities.

The committee submitted a report for the July 2017 meeting that included domains and competencies. The committee continued its work to complete development of the skills needed for each area. The complete body of knowledge is included for the board's approval.

A Body of Knowledge ("BoK") is a document that sets forth the core domains, competencies, and skills required of a given profession, which are defined as follows:

Domains: Core content areas of expertise for legal information professions.

Competencies: Key knowledge areas required for proficiency in each domain.

Skills: Actions demonstrating the appropriate knowledge and experience required to show each competency.

Body of Knowledge (BoK)

This Body of Knowledge (“BoK”) sets forth the core domains, competencies, and skills needed by today’s information professionals. Domains are core content areas of expertise, competencies are key knowledge areas required for proficiency in each domain, and skills are actions demonstrating the appropriate knowledge and experience required to show each competency at both essential and advanced levels. This BoK is designed to serve as a blueprint for career development by legal information professionals, including future professional development opportunities.

Professionalism & Leadership at Every Level

- **Communication**
 - Listen actively, respectfully, and meaningfully.
 - Develop professional speaking and writing skills.
 - Communicate with clarity and confidence.
 - Master non-verbal skills, cultural sensitivity, and emotional intelligence.
- **Decision Making**
 - Define problems, challenges, and opportunities.
 - Identify options and solutions.
 - Assess impact and risk of possible solutions.
 - Develop flexibility to change direction as needed.
 - Implement solutions and maintain accountability.
- **Strategic Problem Solving**
 - Seek opportunities for creative thinking and solutions.
 - Experiment with different strategic models.
 - Develop a future-focused outlook.
 - Break down silos and barriers.
 - Engage stakeholders and explore multiple perspectives.
- **Collaboration & Teambuilding**
 - Establish a vision.
 - Cultivate open communication and knowledge sharing.
 - Foster the development of leadership qualities on teams.
 - Keep collaborative initiatives moving forward.
 - Expand definitions of success and recognize contributions.
- **Ethics**
 - Adhere to professional standards, guidelines, and rules.
 - Ensure integrity, accountability, and fairness throughout the organization.
 - Cultivate an atmosphere of civility.
 - Develop trust and transparent decision making.
- **Continuous Learning & Professional Development**
 - Perform routine self-evaluation and assess gaps in knowledge.
 - Pursue varied opportunities for professional learning.
 - Formulate a professional learning plan.

Research & Analysis

- Knowledge of Law & Legal Systems
 - Develop basic understanding of relevant legal systems and areas of law.
 - Demonstrate ability to identify jurisdiction and legal issues.
 - Analyze the interrelationship of primary legal materials.
 - Develop expertise in core subjects needed to support your organization.
- Knowledge & Navigation of Information Sources
 - Construct and apply research plans.
 - Identify and locate relevant primary and secondary legal authority across subject areas.
 - Differentiate among information sources for relevance, authority, and currency.
 - Choose the most efficient and cost-effective legal and non-legal information sources.
 - Employ varied finding tools and research methods.
 - Keep pace with new tools and content.
- Critical Evaluation & Synthesis of Information
 - Analyze information and identify the most relevant content.
 - Organize information into logical sequence.
 - Identify and address gaps in information.
 - Integrate findings and analysis into high quality work product.
- Ethical Use of Information
 - Comply with all confidentiality and security requirements.
 - Adhere to and advocate for professional and legal guidelines regarding legitimate uses of information.
 - Appraise and communicate source authenticity and reliability.

Information Management

- Collection Development
 - Formulate a collection development policy.
 - Select high-quality, relevant resources.
 - Plan expenditures managed to budget priorities.
 - Manage the acquisitions workflow.
 - Perform collection evaluations and analyses.
 - Evaluate and negotiate vendor contracts and licenses.
 - Develop and implement resource sharing arrangements.
 - Appraise and implement acquisition technologies and systems.
- Organization & Access
 - Organize library resources appropriately for user access.
 - Catalog all types of library resources.
 - Ensure consistency of metadata classifications.
 - Design library systems and services to provide optimal access to resources.
 - Evaluate and deploy library systems, discovery layers, and other access systems.
- Preservation & Retention
 - Implement appropriate techniques for preservation and conservation, including policies and procedures for digitization of library resources.
 - Establish and follow policies for collection retention and withdrawal of materials.
 - Evaluate and implement best practices for special collections.
 - Plan disaster recovery strategies.

- Knowledge Management
 - Create organizational knowledge management policies and procedures.
 - Identify and implement knowledge management technologies and strategies.
 - Link library resources and organizational resources using tools such as enterprise search.
 - Establish and manage an institutional repository and digital archives.
- Information Governance & Risk Management
 - Identify and utilize the basic principles of information governance, including developing expertise in enterprise and life cycle management of information.
 - Develop and maintain knowledge of intellectual property rights, rights management, privacy, and other legal issues.
 - Assess reasonable risks to and protect the security, integrity, and authenticity of the collection against internal and external threats.
 - Utilize technology to create efficient use and governance of information.

Teaching & Training

- Instructional Design & Planning
 - Demonstrate a working knowledge of planning in an instructional environment.
 - Establish learning outcomes, training parameters, and assessment in compliance with organization policies and legal requirements.
 - Develop assessments that are rigorous and accommodate different learning styles.
 - Cultivate an atmosphere of experimentation and positivity in learning environments.
 - Utilize current technologies to enhance learning.
- Presentation & Delivery
 - Hone speaking skills, including vocal control, body language, pacing, and organization.
 - Understand and employ a variety of teaching methods, including presentation styles, delivery, and visual aids.
 - Nurture cultural sensitivity to topics and styles of delivery.
 - Utilize current and developing technologies to aid in the delivery of information.
- Assessment & Metrics
 - Demonstrate a working knowledge of assessment techniques and data collection.
 - Develop formative and summative assessments.
 - Revise instruction based on feedback.
 - Use current technologies to analyze and present collected assessment data.
 - Track trends and the development of new techniques for assessment and data collection.

Marketing & Outreach

- Promotion of Value
 - Create a vision for your organization based on its values and help others see its importance and their role in it.
 - Develop strong presentation skills, including persuasive and confident speech, meaningful visual aids, and use of appropriate technologies.
 - Build strong relationships and rapport with key stakeholders.
 - Use assessment metrics to evaluate use and services, and deliver key metrics to

stakeholders to show return on investment (ROI).

- User Experience
 - Identify the needs and preferences of your users.
 - Analyze all aspects of a user's interaction with the organization and its services.
 - Create promotional opportunities where targeted users will naturally encounter them.
 - Solicit and incorporate feedback.
- Partnerships & Community Relationships
 - Promote the role of law libraries and legal information within the larger community.
 - Coordinate and share services to achieve the best institution-wide solution.
 - Identify opportunities to establish or enhance partnerships and community relationships.
 - Coordinate individual efforts with national and local professional organizations.
- Advocacy
 - Champion new ways to share legal information expertise and promote services both inside and outside of your organization.
 - Work to secure access to justice through ensuring reliable, long-term access to authentic legal resources.
 - Engage in outreach to local, state, and national lawmakers and propose policy solutions to legal information issues.
 - Promote legal information services to those in need.

Management & Business Acumen

- Vision & Strategic Planning
 - Demonstrate strategic planning processes and best practices.
 - Formulate a strategic plan framework including vision, mission, and goals.
 - Prepare an operational plan for implementing strategic plan goals.
 - Measure achievement of strategic plan goals and alter as needed.
- Budgeting & Procurement
 - Use generally accepted accounting principles.
 - Monitor budget allocations, expenditures, fund balances, and related financial activities.
 - Perform cost analyses and ROI calculations to determine resource allocation.
 - Track national cost and spending trends related to library and information resources.
 - Establish efficient and legally compliant procurement guidelines.
 - Demonstrate bargaining and contract negotiation skills.
- Funding & Development
 - Maintain knowledge of and pursue internal and external funding opportunities.
 - Compile annual budget requests using past financial records, detailed rationales, future needs, and economic indices.
 - Advocate for institutional support to ensure maintenance and growth of the library.
 - Establish effective networks and partnerships for resource sharing, collaboration, and consortial purchases.
 - Monitor national trends in library funding and market price fluctuations.

- **Benchmarking & Data Analysis**
 - Deliver key metrics of business operations, user analytics, and ROI to stakeholders.
 - Select and use appropriate data analysis tools and methods including visualization, text analysis, and statistical modeling.
 - Identify and apply analytics to business issues.
 - Create and communicate effective analytical and benchmarking reports.
- **Human Resources**
 - Develop hiring expertise including recruitment tactics and interview skills.
 - Implement policies and procedures that comply with federal and state employment law.
 - Create training programs that empower employees to fulfill daily job functions, advance to other positions, and adapt to institutional changes and industry shifts.
 - Demonstrate supervisory best practices including fostering teamwork and clearly communicating goals and expectations.
 - Evaluate organizational structure and workflows to maximize efficiency and job performance.
 - Design a staffing succession plan.
- **Project Management**
 - Describe fundamental project management processes, methodologies, and tools.
 - Analyze project requirements and develop a clear statement of the project's scope.
 - Plan, organize, and manage resources to successfully complete specific project objectives within a specified time frame.
 - Establish effective team structure and delegate areas of responsibility appropriately.
 - Monitor project progress, control risks, and realign project parameters if needed.
 - Communicate project information to stakeholders in clear written and verbal formats.
- **Facilities Management**
 - Apply industry standards for design, facilities, and space management.
 - Implement inventory control policies and procedures.
 - Evaluate and monitor building infrastructure systems.
 - Develop emergency preparedness and business continuity plans.
 - Establish security policies that align with those of the parent organization.
 - Monitor national trends in library facilities, emergency preparedness, and security.

Body of Knowledge Development Special Committee
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During the past year, the committee participated in monthly conference calls, and its work included (i) finding and reviewing similar documents in other professions, (ii) brainstorming content relevant to legal information professionals, (iii) deciding on the best domains for the BoK, and (iv) assigning each member of the committee a domain section to draft. The committee used Google Docs as a collaboration tool to allow for committee members to post their own work as well as review and comment on the competencies and skills created within domains other than their own.

The resulting work was thoughtfully done, but, unsurprisingly, it did not read as a cohesive draft when compiled into a single document. As a result, the committee met in person in Chicago on June 9th to analyze and edit the draft together. During that day, the committee made tremendous progress, which included reworking the existing domains and competencies. These revised domains and competencies are set forth on the next page of this document.

The next step is for the committee members to redraft the skills listed under each competency within all of the domain sections and then regroup at the AALL Annual Meeting in Austin in July to make final edits. Each committee member was assigned a new domain section in order to give its consideration the freshest possible eyes. Assuming the work goes as planned, the committee plans to submit its final draft to the AALL Executive Board for its consideration by the end of July.

Following this submission, the work of the committee will be at an end, but the committee has some suggestions for the board's consideration for future action:

- Solicit stakeholder input before finalizing the document. This is critical to association-wide buy-in and allows for field testing before its official release. It is important to solicit this feedback from both internal stakeholders and external partners.
- Consider a process to update the BoK so it can be a living document, rather than something more static. Committee member ideas included creating an advisory group or assigning it to an existing committee to work on it going forward as well as delivering it in a database format to allow for more personalized interaction with the BoK.

BoK Domains & Competencies (as of 6/9/17)

Professionalism & Leadership at Every Level

- Communication
- Decision Making
- Creative Thinking/Strategic Problem Solving
- Collaboration
- Ethics
- Continuous Learning/Professional Development

Research & Analysis

- Knowledge of Law & Legal Systems
- Subject Matter Expertise
- Knowledge & Navigation of Information Sources
- Critical Evaluation & Synthesis of Information
- Ethical Use of Information

Information Management

- Collection Development
- Organization & Access
- Preservation & Retention
- Knowledge Management
- Information Governance

Teaching & Training

- Instructional Design/Planning
- Facilitate Learning
- Presentation & Delivery
- Assessment & Metrics

Marketing & Outreach

- Promotion of Value
- User Experience
- Partnerships & Community Relationships
- Advocacy

Management & Business Acumen

- Vision & Strategic Planning
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- Benchmarking & Data Analysis
- Human Resources
- Project Management
- Facilities Management