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## Letter to AALL Chapter Presidents regarding the AALL Strategic Challenge, December 19, 1994

Margaret Axtmann

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## AMERICAN ASSOCIATION OF LAW LIBRARIES

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### MEMO

**TO:** Committee Chairs  
SIS Chairs  
Chapter Presidents  
Representatives

**FROM:** Margie Axtmann, Chair  
AALL Strategic Planning Committee

**DATE:** December 19, 1994

**RE:** The Strategic Challenge, 1994-1998

The Strategic Planning Committee will meet February 10-11, 1995 to prepare recommendations on specific priorities for the 1995-96 program year. I am asking the AALL leadership to assist us with our work by providing some information about AALL's strategic plan.

I would appreciate your response to the attached questionnaire by January 15, 1995. I realize that this is a short time frame during a very busy season, but we do not need lengthy reports from you. I hope you can find time to help us with our planning effort so that we can continue to respond to member needs in developing our priorities.

Please send your completed questionnaire to my attention at AALL Headquarters. Feel free to call me at (612) 625-4301 if you have any questions. Thank you for your cooperation.

**cc:** AALL Executive Board  
Strategic Planning Committee

**encl:** The Strategic Challenge, 1994-1998

**ref:** f:\wp\patrick\axtmlrp.mmo

## AALL STRATEGIC PLANNING COMMITTEE QUESTIONNAIRE

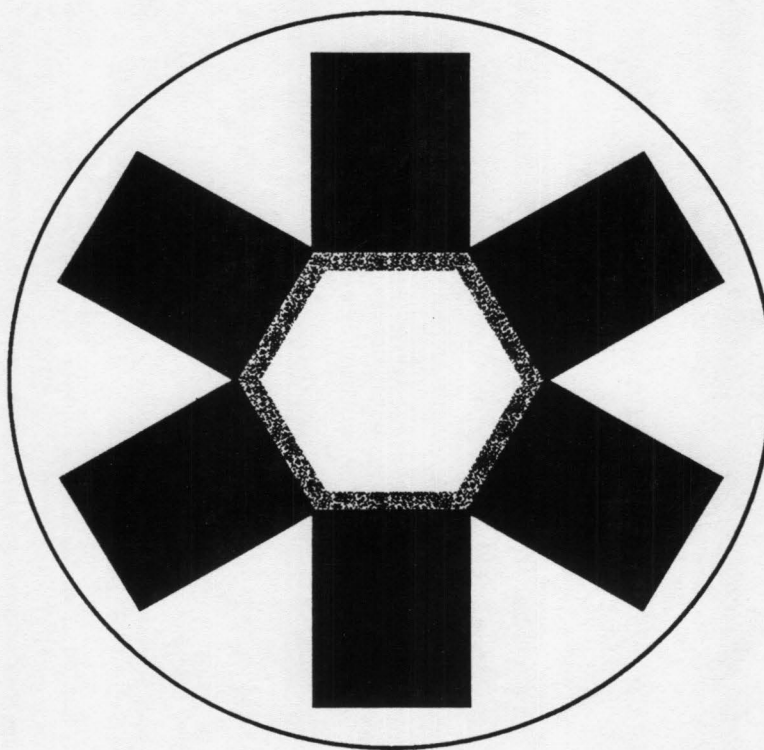
(Please return your completed questionnaire to the attention of Margie Axtmann at AALL Headquarters by January 15, 1995)

- 1) What is your general assessment of The Strategic Challenge, 1994-1998 and the priorities that have been set for the Association through the strategic directions and initiatives?
- 2) Are there any of the strategic initiatives that in your view require higher priority?
- 3) What activities have you undertaken this year (1994-95) that are in support of the strategic plan?
- 4) What activities are you planning, or would you like to plan, for next year (1995-96) that will be in support of the plan? Please provide as much detail as possible and indicate if you will be requesting any resources (financial and/or staff) from AALL for these efforts.



American Association of Law Libraries

## THE STRATEGIC CHALLENGE 1994-1998



### **AALL Mission Statement**

Recognizing that the availability of legal information to all people is a necessary requirement for a just and democratic society, the American Association of Law Libraries exists to promote and enhance the value of law libraries to the public, the legal community, and the world, to foster the profession of law librarianship, and to provide leadership in the field of legal information and information policy.

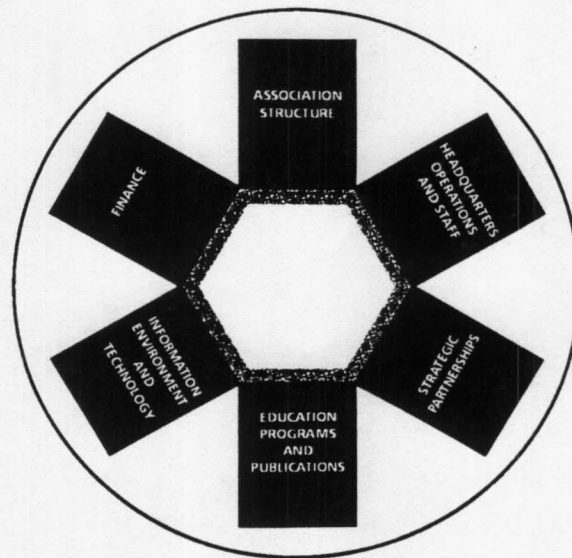


AMERICAN ASSOCIATION OF LAW LIBRARIES  
THE STRATEGIC CHALLENGE  
1994-1998

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## EXECUTIVE SUMMARY



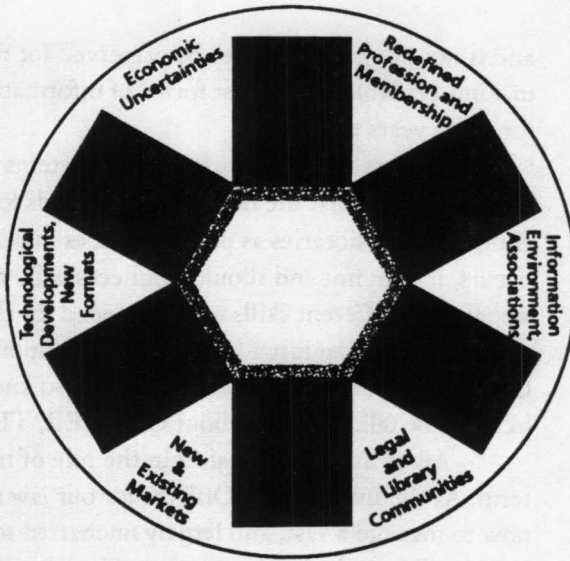
The Long Range Planning Committee of the American Association of Law Libraries presents the strategic plan for 1994-1998. It is considerably different in content and format from AALL's 1990-1994 plan. Rather than identifying a long list of goals and objectives that would detail the Association's work for the next four years, the plan attempts to identify and resolve issues that are crucial to the future of the Association.

This plan is based on the concept of strategic directions. A strategic direction is defined as one in which AALL must move to gain, maintain, or avoid losing a winning stance. Taking all of the information that has been gathered throughout the year into account, the Long Range Planning Committee has identified six strategic directions which will chart the course of AALL for the next four years. The strategic directions are:

- I REINVIGORATE THE STRUCTURE OF AALL
- II PROVIDE LEADERSHIP TO SHAPE THE LEGAL INFORMATION ENVIRONMENT IN A TIME OF RAPID TECHNOLOGICAL AND PUBLIC POLICY CHANGES
- III INCREASE AND DIVERSIFY AALL'S EDUCATION OFFERINGS TO MEMBERS AND NON-MEMBERS
- IV ENCOURAGE AND SUPPORT STRATEGIC PARTNERSHIPS AND PURPOSEFUL EXCHANGES WITH OTHERS
- V CREATE FINANCIAL STABILITY TO SUPPORT THE PROGRAM AND MEMBERSHIP THROUGH WISE USE OF RESOURCES
- VI BUILD A SUPERLATIVE ASSOCIATION AND HEADQUARTERS OPERATION

Each strategic direction is accompanied by a description of what it encompasses and a rationale for its identification as strategic. Specific initiatives in pursuit of these strategic directions have been identified by LRPC [and approved by the Executive Board]. It is our expectation that initiatives supporting the strategic directions also will be developed at other levels of the organization.

## ENVIRONMENTAL SCAN



The 1990's are a time of change. Changes in technology, in the means of publication, in the economy, and in libraries of all types, are causing fundamental shifts in the ways in which legal information is produced and disseminated, along with the ways in which we deliver that information to our clients. Moreover, changes in the Association itself have made it larger, more dynamic, more diverse, and more complex than ever before.

### External Environment

#### Technology, Changing Roles, and Professional Education

Without any doubt, the greatest concern expressed by the members of AALL in the various surveys and focus groups leading up to this plan, was the impact of technology on libraries in general and their own law library in particular. As recently as the early 1970's, most law libraries were paper collections of primary legal materials, one, or at most two, journals from each law school, and a manageable number of treatises on an array of legal topics. To this print collection was quickly added a variety of microform materials and two small but growing legal databases, LEXIS and WESTLAW. More recently, it has seemed that every major publisher has turned to CD-ROM as another means to disseminate its products. At the same time, more new data bases have become necessary to meet the needs of our clients: LEGISLATE, DIALOG, CQ, Dow-Jones, and a number of others.

On top of this already complex world of information is the bewildering array of legal information just beginning to emerge on the INTERNET. It seems that almost every source of primary legal information is making or planning to make that information available via the Net. In many ways, these sources simply replace what was previously available in other forms. For example, many courts are now disseminating (but not necessarily retaining) their current (slip) opinions electronically. In other cases, these new databases will make readily available what was previously difficult to locate, such as information on current bills in the various state legislatures. The information that is available in these new forms changes daily as new databases are announced, INTERNET addresses are changed, and new delivery systems (WAIS, GOPHER, World Wide Web, MOSAIC) are developed and released.

As so many new ways of acquiring legal information are developed and announced, the situation resembles nothing so much as the LEXIS starfield screen with more and more stars rushing toward us at an ever increasing speed. As law librarians, we have access to more information in a greater diversity of formats than ever before. At the same time, much of that information has no bibliographic control, is in non-standardized formats, has no convenient mechanism for searching,



and is not in a form likely to be preserved for future researchers. These difficulties of using and making available the newest forms of information are issues that are likely to challenge the profession for some years to come.

Despite the problems, the new systems are fundamentally changing the profession. Some have even suggested that the newest of the trends foreshadow some significant downsizing, or even the elimination of libraries as physical spaces in certain circumstances. Even if such a development occurs, it does not and should not necessarily mean the elimination of the legal information professional. But, different skills will be needed for the legal information manager at the turn of the century than was true even just a few years ago. Not only must we be familiar with *Statutes at Large*, *Federal Cases*, and *Corbin on Contracts*, we must also know how to navigate the INTERNET. We are more likely to be talking today about GOPHER, TELNET, and FTP than about Blackstone and Coke.

All of this signals a shift in the role of the Librarian, almost a change in the definition of the term. As the Information Officers for our law firm, law school, or other legal organization, our task is now to manage a vast, and largely uncharted sea of information, to map out the islands of legal information, and to make them readily accessible to our clients.

As our role changes, the nature of our professional education will also change. But as a significant number of library schools have closed over the last few years, the challenge to rethink the requirements for entry into the profession will increasingly fall to the profession itself. Indeed, it may be that if library schools continue to close, the professional associations will have to fill the void.

Such profound changes are as unsettling to many of those with whom we have worked in the past as they are to us. Publishers are uncertain about their future, and even within our own parent organizations, turf issues are arising between the librarians as information professionals and the technical people who provide computer support and administer the local networks. Whatever tensions may exist, it is clear that in the end we will all need to work together in the best interests of legal researchers, the lawyers, judges, and law students and faculty, who are our clients.

## The Economy

Most of the 1980's were growth years. Law firms expanded. Starting salaries for lawyers and applications for law school reached all time highs. Libraries of all sizes and types automated their operations, and the personal computer, which began in a garage in the late 1970's, was ubiquitous by the end of the 80's.

By the late 80's and early 90's, however, the rapid growth had come to an end. Federal, state and local government budgets were under severe pressure, and publicly supported libraries of all types faced cuts in hours and programs as well as cuts to the materials budgets. Law school budgets were often stagnant, and some academic law libraries saw cuts to the book budget and staff that were unthinkable a few years before. Even law firms were not immune to the recession. Law firms that expanded only a few years before began laying off lawyers, and clients began questioning the LEXIS and WESTLAW fees added on to their bill. Every part of the operation, including the library, was subject to greater scrutiny concerning their costs and their contribution to the bottom line.

In the middle 1990's, the recession has largely come to an end, but the rapid growth has not returned and no one seems to be predicting that it will. Law firms are making fewer permanent hires, law school library budgets are barely keeping up with inflation, and many governments are still trying to find ways to downsize.

During this same period, there has been an increasing concentration among traditional legal publishers. Shepards, for example, was purchased by McGraw Hill. Many of the new owners of American legal publishers are outside the United States. Thomson and Thomson (a Canadian company) purchased a number of legal publishers including Callaghan, Clark-Boardman, Warren Gorham & Lamont, R.I.A., Lawyer's Coop., Sweet & Maxwell, Carswell, and several others. Prentice

Hall was purchased by Maxwell-MacMillan which in turn sold it to Thomson who divided the publications among their different divisions. UPA and CIS are both owned by Elsevier, a Dutch company. In turn, Elsevier was purchased by Reed, which is based in London. Even as the concentration increased among traditional publishers some new providers have emerged to provide access to legal information in electronic form. Counterpoint is providing access to the *Federal Register* on the INTERNET, and several start-up companies are developing new techniques to provide legal information on CD-ROM.

AALL has held its own during the recession, but members have shown an increased desire to understand the value they receive for the money they put into the Association. Even the *Biographical Directory* and the *Law Library Journal* have been questioned. Attendance at the annual meeting has remained basically stable and even increased somewhat, as the attendance at the 1993 annual meeting in Boston was the highest ever. However, in the same year, two pre-conference institutes had to be cancelled because of insufficient enrollment. Some felt that fewer members were able to take the extra time necessary to attend an institute in addition to the annual meeting. Educational programs are in great demand, but the Association needs to take care that they are affordable, and, that whenever possible, they are available in a variety of locations to minimize the need to travel. Similarly, as the economy has put more pressure on law firm librarians, it appears that fewer of them will be able to find the time to volunteer on behalf of the Association.

## Public Policy Environment

AALL has been involved in Public Information Policy since about 1989. Then, many of the issues centered on the efforts of the Reagan and Bush administrations to reduce access to Federal government information in a variety of ways. In general, the effort was either to privatize the function directly as when the Reagan administration proposed to privatize the NTIS, or to do it indirectly by reducing government output and creating a climate conducive to business with policies that favored private dissemination over government dissemination. Throughout the period, specific publications were eliminated, funding for the government depository program remained flat, and many proposals were made (and mostly fended off) to keep the government out of publishing. (It was said, for example, that the government shouldn't compete with the private sector; indeed, it was said that the government shouldn't even develop an information product if private sector companies *might* be developing a similar product.)

With the change of administrations, the issues have shifted dramatically. The Clinton administration has not rolled back the Reagan-Bush policies; rather, they have struck out in an entirely new direction. The government is no longer affirmatively trying to reduce dissemination; instead the Clinton-Gore administration has proposed the development of a National Information Infrastructure for the exchange of all kinds of electronic information nationwide. Dissemination of government information over the NII is a key component of the administration proposal, and many agencies are anticipating an electronic future by developing methods and systems for the announcement of rules and decisions, and the release of other information products electronically.

As a result of the Clinton-Gore proposal, the issues are now quite different than under the previous administration. Telecommunications regulation and the structuring of a communications environment that will promote appropriate policy goals are now the focus. Among these are the need for "universal access", protection of individual privacy, open access for a variety of information providers, encryption of information and access to systems by law enforcement agencies, etc. In addition, of course, it is necessary to ensure that government agencies do, in fact, have the right and obligation to disseminate their information electronically without undue costs or restrictions on users. Further, some vigilance will be needed to ensure that the public continues to enjoy a right of free access to Federal government information as they have under the Depository Library Program.



Copyright has also re-emerged as a major issue for the first time since the passage of the Copyright Reform Act in 1976. Finding appropriate ways to protect the interests of copyright owners when their works are disseminated over the National Information Infrastructure is deemed one of the keys to the success of the NII. At the same time, the library community is concerned to protect some semblance of fair use and the rights they have enjoyed under the 1976 Act for interlibrary lending and preservation. Fair use promotes the use of materials for purposes of research and scholarship. Preservation may be even more important in the electronic environment than for paper, since works disseminated electronically are, by their nature, volatile, and probably short-lived. Someone will need to take steps in a coordinated and systematic way to preserve such materials or they will inevitably be lost to history. The resolution of these complex issues is fundamental for the eventual success of the National Information Infrastructure as a medium of dissemination.

## Internal Environment

### Growth and Diversity

AALL has grown rapidly over the last decade. In 1983, membership was just 3454; by 1993 it stood at over 5,000, a 46 percent increase in ten years. Actually, perhaps reflecting the expansion of the economy alluded to earlier, most of the growth took place between 1983 and 1989. In the years since 1989, there was one growth year, but generally speaking, membership has been relatively stable in the 1990's, hovering around 5,000. Over the decade from 1983 to 1993, attendance at the annual meeting has increased even faster than membership, going from 1177, or 36 percent of the membership, at the 1983 meeting in Houston to 2,264, or 44.8 percent of the membership at the 1993 meeting in Boston, an increase of 92 percent.

	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994 (to date)	Net Change 1983-1993	Percent Change
Total Membership	3454	3509	3728	3974	4221	4366	4400	4829	4812	5049	5058	4976	1604	46.4
Law Firm Members	877						1532	1711	1725	1796	1777	1689	900	102.6%
% Law Firm	25.4%						34.8%	35.4%	35.8%	35.6%	35.1%	33.9%		
Academic Members	1161						1435	1406	1427	1497	1489	1481	328	28.3%
% Academic	33.6%						32.6%	29.1%	29.7%	29.6%	29.4%	29.8%		
Govt & Court Members	707						807	796	791	805	792	735	85	12.0%
% Govt & Court	20.5%						18.3%	16.5%	16.4%	15.9%	15.7%	14.8%		
Registrations, Ann Mtg	1177	1411	1749	1846	1734	1853	1762	1993	1847	2110	2264	N.A.	1087	92.4%
% Members at Mtg	34.1%	40.2%	46.9%	46.5%	41.1%	42.4%	40.0%	41.3%	38.4%	41.8%	44.8%		67.8%	

Perhaps more significant than the simple growth in membership is the change in composition of the membership. During the last decade, private law librarians have increased from 25.4 percent of the membership to 35.1 percent in 1993.

Minorities, too, have been participating far more actively in the work of the Association in recent years. Although relatively small as a percentage of the overall membership (approximately 4.7 percent), 235 members of the Association have self-identified as minorities in the 1993-1994 Directory. This number has increased every year since the listing began. Furthermore, there is a Presidential and Executive Board commitment to include minorities in all the activities of the Association, including appointment to committees. Volunteerism among minorities is high, with 19 percent of all volunteers for committee appointments in 1994 - 1995 coming from the ranks of minorities. As a result, in 1993 - 1994, 23 committee members and four committee chairs were members of minority groups.

Finally, there has been a substantially increased membership from unaffiliated law librarians. In many cases these are free-lance librarians, librarians from law-related associations, and others who don't fit neatly into our type-of-library SIS's. As the Association moves into its next stage of development, this category may become increasingly important as it may represent those seeking to bridge traditional library models and roles with newer roles provided by developing network technology. The Association needs to be sure that it is meeting the needs of this new kind of legal information professional and it should also take advantage of what they have to offer.

These changes, in size, and in the diversity of the membership, have added complexity to the organization at the same time as they have brought a greater diversity of interests and a heightened energy level and vibrancy concerning the future. In recent years, more elected leadership positions than ever before have been occupied by librarians other than academic law librarians. Programs sponsored by the Special Interest Sections and the Caucuses demonstrate the wide range of interests of our members. Minority law librarians have promoted law librarianship and AALL at a national conference of African-American librarians. This diversity is to be prized and encouraged as we strive to keep the Association relevant to the newest generation of law librarians.

The growth of the Association has finally made it too large to hold its meetings in hotels, and future meetings are planned for convention centers. Convention centers can easily hold all of our meetings, large and small, but they are also likely to change the dynamic of the annual meeting.

Among other things, convention centers are more expensive than hotel-based conventions since the Association has to pay for all rooms, instead of receiving them free as a benefit for occupying a large number of sleeping rooms in the hotel. In the convention centers it will be a challenge to keep the cost of the meetings manageable, while at the same time maintaining opportunities for many small groups to meet alongside the larger programs organized by the Association. On the other hand, with more space available for exhibits in the convention centers, an increased number of exhibitors may help to offset the higher costs.

In addition, with the convention center being at least some distance from the hotels in which members are staying, there will be fewer opportunities for the members to mingle and meet one another casually and by chance. To maintain the synergy that comes from such opportune meetings, we will have to rely more than ever on the various social functions sponsored by the Association.

## Leadership & the SIS's

As the Association has grown and diversified, the Special Interest Sections — both type-of-library SIS's and subject-oriented SIS's — have become increasingly important. In many ways for many members, the Special Interest Sections have become a primary focal point for their activities within the Association. SIS's provide leadership opportunities for many more members than can be accommodated by the Association itself. These opportunities include not only the opportunity to serve as an officer, but also the ability to plan and execute programs, to create and work on committees and task forces, and the opportunity to write or edit a newsletter. Such opportunities are particularly useful for newer members, who want, need, and should have a way to play a significant role within the Association. At the same time, they provide places where more experienced members can also contribute.

SIS programs have become an essential component of the annual meeting. They represent the best thinking and planning of the widest range of interests of our members, and they provide diverse educational opportunities for everyone. The programs are also important to the SIS itself, since they provide a way for members of the SIS to expand their knowledge and expertise in the field, they provide a way to extend their expertise to others, and they provide a focus for the activities of the SIS. Despite the importance of being able to present programs at the meeting, some SIS's have expressed a concern about an apparent inability to get on the program after several years of trying.



SIS's, their activities and their programs, have enriched the association and given it depth and texture. They provide a means by which the Association can respond to meet new needs and interests of members as they emerge. Their wide range of activities and programs needs to be cultivated and encouraged.

### **Relationship to Other Organizations**

As the world has grown more complex, there has developed a strong sense of interdependency among a wide range of people and associations. Among other things, modern telecommunications has made everyone far more accessible than ever before. But in addition, technology is blurring even fairly basic roles. A researcher one day is an author and publisher the next; a law library is no longer just a law library; rather, through a variety of means, it now provides access to a whole universe of relevant information. Yet, as our mission is broadening at the same time as there is an emphasis on downsizing and elimination of services and people, we need to share resources and good ideas whenever possible; we also need to enlist the support of others whenever it may be useful to help us meet our mission.

All of this suggests that AALL and its members will, in the future, work more with a wider variety of organizations. These organizations will, of course, include other library organizations, but will also include stronger ties with legal organizations and both print and electronic publishers. No doubt, we will also be working closely with the people and organizations involved in building the nation's National Information Infrastructure.

Both A.L.A. and S.L.A. now have subdivisions that include law, reflecting the needs of their members to know more about legal information, but also potentially providing some competition for the attention of our members. Nonetheless, all library organizations share a set of common interests, and while we will work together on those, AALL and its members will undoubtedly remain the authority and center of expertise on law librarianship and legal information retrieval.

Similarly, the legal information needs of our clients, lawyers, judges, law professors and students, make it imperative that we have a close working relationship with them and their professional organizations. Our interests are, or should be, their interests, and vice-versa.

Legal publishers and law librarians have always worked closely together. In reality, we are both fundamentally a part of the same enterprise: providing legal information to those who need it. This relationship will be tested in the coming months and years as new information technology threatens and redefines traditional roles. Nonetheless, the very fact that old roles are being redefined makes it all the more imperative for librarians and publishers to continue to work together in the best interests of their mutual clients.

The National Information Infrastructure is increasingly becoming a means of access to legal and law-related information. Yet the information there is fragmented, unorganized, and mostly unsearchable. Law Librarians will need to work with networkers and their organizations to influence the development of this new medium and to solve these and other problems related to the delivery of legal information in this new form.

### **Headquarters**

As Association Headquarters has worked to support a rapidly expanding membership, the staff has increased somewhat in size, become increasingly sophisticated in the use of technology, and become increasingly professional in its operations.

In 1993, the Association hired a talented new Executive Director, Roger Parent, when the previous Executive Director, Judy Genesen retired. Ms. Genesen was an effective leader for the Association for four and a half years, reaching out far beyond the Association, overseeing much of the period of growth described earlier in this report.

Parent comes to the Association at a time when the growth has largely stabilized, but when the members are demanding more support and an increasingly efficient and effective operation at headquarters. He can be expected to give close attention to the Association's fiscal affairs, its use of automated systems, and the training and professionalization of the staff. The demands on the staff will grow no less during the next several years, and the Association is fortunate to have Mr. Parent in a position to help us achieve the goals of this plan for the benefit of the Association and its members.

# VISION STATEMENT

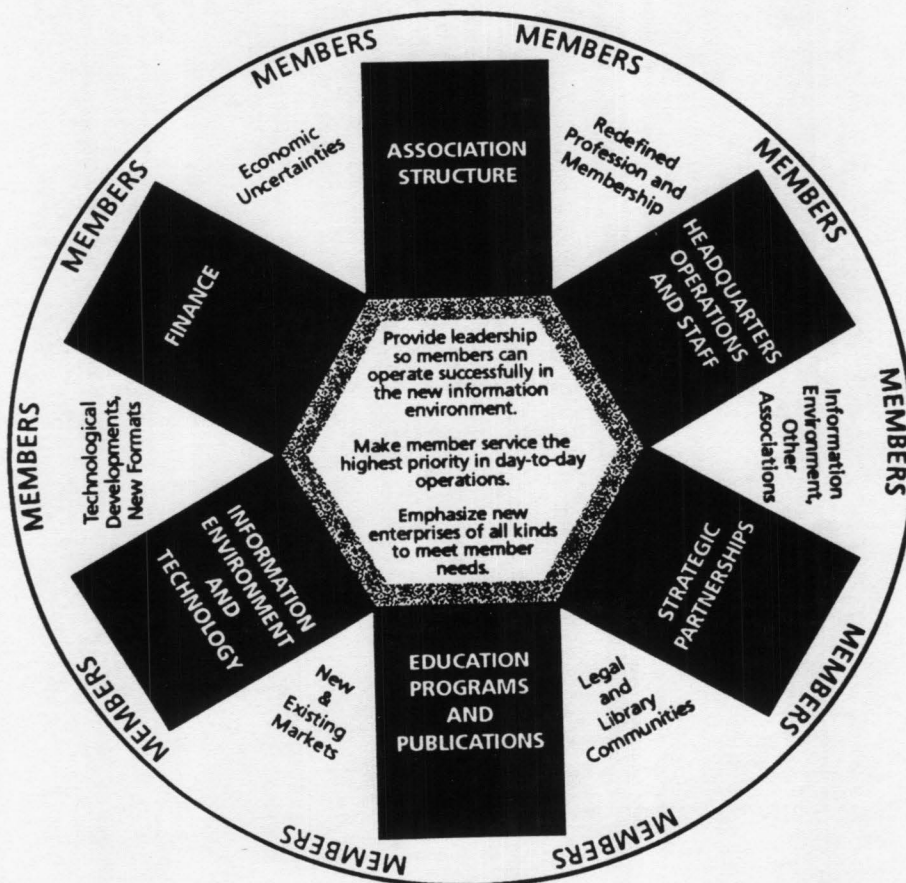
An essential component of a strategic planning effort is the development of a vision for the future of the organization. The vision of the American Association of Law Libraries evolved from exercises carried out by the Executive Board and the Long Range Planning Committee. A number of common themes arose as these groups articulated the desired future of the Association.

AALL should be a strong leader in the library, information and legal communities, it should respond to the stated needs of the members, and it should be an Association whose opinions are sought and valued. Attaining a leadership position can be achieved in a variety of ways: by playing a primary role in the education of law librarians, by helping members to understand and keep pace with rapidly changing technologies, and by forming partnerships with other associations and groups.

Leadership within the organization is also vital to AALL's future success. The large and diverse membership is a strength on which to capitalize, and the governance structure of the Association should provide opportunities for the members to further AALL's mission and serve in leadership positions. The Executive Board will continue to work with AALL members to include the strong tradition of member activity and support as a key element of the Association's desired future.

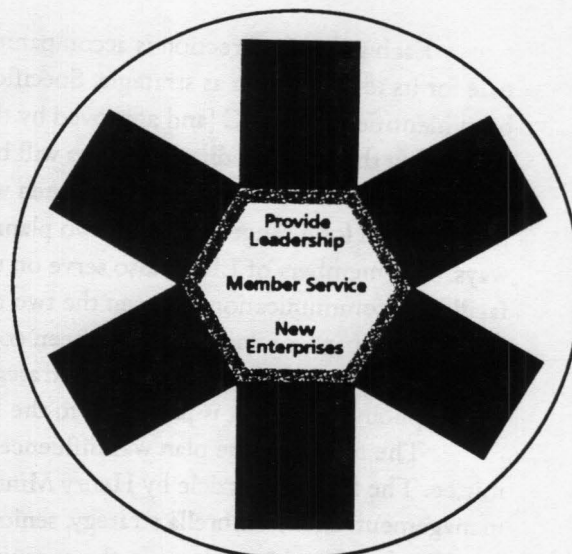
This vision of the future of AALL is dependent on the Association's financial stability and on strong support from the headquarters office. The plan seeks to ensure that these solid underpinnings will be in place to allow the vision to become reality.

A graphic representation of these themes is shown below and is also used throughout the document to highlight areas of the plan.





## PLAN CONCEPT AND PROCESS



The year-long process of developing AALL's second long range plan has taken us on a path that has had many twists and curves. From the beginning the Long Range Planning Committee (LRPC) was in agreement that AALL's 1990-1994 plan was highly successful and allowed the Association to accomplish a long list of important tasks. But the Committee also agreed that the next plan should be different.

First, we decided that the plan should be more strategic in nature than the first plan. Rather than compiling a long list of goals and objectives that would detail the Association's work for the next four years, the plan should identify and resolve issues that are crucial to the future of the Association.

Secondly, we decided that the plan should not attempt to be all-inclusive. The first plan carried a heavy reporting burden, as a large number of groups within AALL were involved in completing tasks that had been assigned under the various goals and objectives of the plan. While we want to encourage the continued involvement of members at all levels of the organization, we don't think that the plan has to outline every task that should be performed and reported.

Before our year of planning began, we set up a variety of mechanisms for members of AALL to give us their opinions about general and specific issues facing AALL and the profession. These mechanisms included the town meeting held at the Boston Annual Meeting in 1993, a short planning questionnaire that was distributed at that annual meeting and printed in the AALL *Newsletter*, the opportunity to sign up for a phone call from a member of LRPC, chapter focus groups held in four different cities, and informal discussions conducted by Executive Board members as they made chapter visits on behalf of AALL. A number of recurring themes became apparent as this feedback was gathered, and these themes formed the basis for many of the elements that the Committee included in the plan.

The Committee met four times during the year, and all but one of those meetings was conducted by our facilitator, JoAn Segal. JoAn also conducted a "visioning" session for the Executive Board in November, at which the Board identified its view of the future of AALL and the key success factors for AALL to realize that future. While LRPC and the Board participated in exercises to identify issues and begin to formulate goals, Committee members were also reading about various aspects of strategic planning for non-profit organizations.

In the end we decided we liked the concept of strategic directions. We defined a strategic direction as one in which AALL must move to gain, maintain, or avoid losing a winning stance. Taking all of the information that had been gathered throughout the year into account, the Committee identified six strategic directions which will chart the course of AALL for the next four years.

Each strategic direction is accompanied by a description of what it encompasses and a rationale for its identification as strategic. Specific initiatives in pursuit of these strategic directions have been identified by LRPC [and approved by the Executive Board]. It is our expectation that initiatives supporting the strategic directions also will be developed at other levels of the organization.

Another AALL committee has been working throughout this year to develop the Association's first financial long range plan. The two planning committees have coordinated their efforts in several ways. Two members of LRPC also serve on the Financial Long Range Planning Committee, which facilitated communication between the two committees. Although the work of the Financial Long Range Planning Committee has not been completed, we have been able to link their work with this plan by including their principles in a strategic direction on financial stability. The full financial plan will be published after it is presented to the Executive Board in November, 1994.

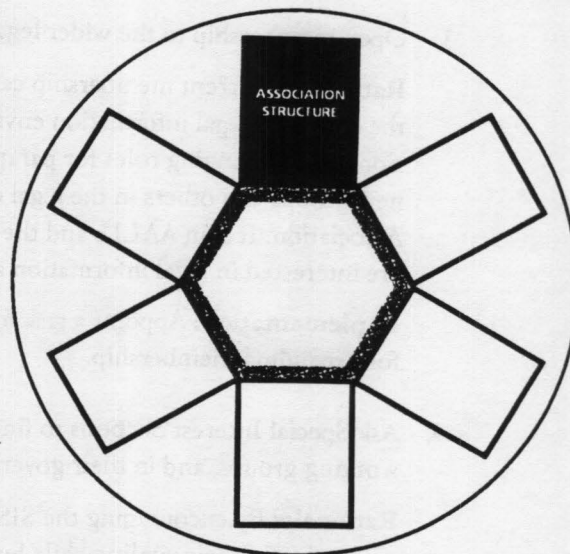
The format of the plan was influenced by two publications that were reviewed by the Committee. The first is an article by Henry Mintzberg that describes one grass-roots approach to strategic management. In his umbrella strategy, senior management sets out broad guidelines and leaves the specifics to others lower down in the organization. (Mintzberg, "Crafting Strategy," Harvard Business Review (July-August 1987): 66-75.)

The second publication that influenced the Committee is the third long-range plan of the Baltimore County Public Library. BCPL had successfully created and carried out two five-year planning cycles, and they wished to move to a less bureaucratic planning and operating mode. They created a plan that was more open-ended in time and allowed for broader involvement by library staff. (Rodger, Eleanor Jo. Commitment to Renewal: Baltimore County Public Library, Long Range Plan III, 1989-1993. Towson, Md.: Baltimore County Public Library, 1988.)

The Committee used the concepts expressed in the Mintzberg article and the BCPL long range plan to fashion a new kind of plan for AALL. The strategic plan for 1994-1998 includes the setting of direction by the AALL Executive Board, and it allows for the creation of action plans and implementation designs at the level of the organization where they will be carried out, with approval by the Board. This innovative approach will encourage full participation by the members in the work of the Association.

All efforts of this kind are made possible only by the hard work of many people. The Long Range Planning Committee is chaired by Margaret Maes Axtmann; members are Carol D. Billings, Martha S. Brown, Mary Lu Linnane, Judith A. Meadows, Robert L. Oakley, Roger H. Parent, and Kay M. Todd. The consultant to the Committee is JoAn S. Segal. Countless members participated in the process by answering questionnaires, making phone calls, writing letters, and attending focus groups. We acknowledge all of these contributions with gratitude.

## STRATEGIC DIRECTION I: REINVIGORATE THE STRUCTURE OF AALL



### Description

Examine the organizational structure of AALL to ensure that it provides a framework for accomplishing the mission of the Association.

### Rationale

The diversity of type-of-library and other interests of AALL members provides a richness of texture and educational opportunity. Reinvigorating the governance structure will increase the vitality of AALL and create a pool of new members. It will have the impact of enabling a large percentage of the membership to address their specific and sometimes unique needs and to feel enfranchised. As a consequence, the Association will be stronger, membership will grow, and members will feel a greater allegiance to the Association.

### Initiatives

1. Ensure that the Executive Board reflects the variety of constituents in the Association.

**Rationale:** For the Board to function effectively in the interests of the members, it needs to reflect broadly the general composition of the membership.

**Implementation:** Charge a task force or committee to recommend options that would assure a Board that is representative of the various types of libraries and that perpetuates a role for the SIS and Chapter representatives on the Board.

2. Foster diversity among the membership and leadership of the Association.

**Rationale:** The profession of law librarianship and the Association should reflect the composition of the society it serves.

**Implementation:** On every occasion where it is possible, include minority members in activities such as recruitment, appointment to committees and task forces, nominations, educational programs, and alliances with other groups.



3. Open membership to the wider legal information community.

**Rationale:** Current membership categories are both restrictive and complex. At the same time the changing legal information environment is creating new groups of legal information professionals and changing roles for paraprofessionals. Greater and meaningful involvement by these new groups and others in the legal community is vital to the future of the profession and the Association. It is in AALL's and the profession's best interests to welcome all who work with and are interested in legal information as part of the Association.

**Implementation:** Appoint a task force to examine membership categories and make proposals for expanding membership.

4. Ask Special Interest Sections to find ways to include newer members on all their committees and working groups, and in their governance processes.

**Rationale:** By encouraging the SISs to create more opportunities for newer members, the SISs will maintain their vitality while building a larger pool of leadership candidates for the Association as a whole.

**Implementation:** Working with the Chair of the SIS Council, the Board will send this request to the SISs and ask for a report outlining the means of implementation.

5. Strengthen relationships between AALL and its chapters.

**Rationale:** Focus groups and others have suggested that different models of organization might have advantages for AALL and its chapters. Other organizations have different relationships with their chapters and might provide useful examples of alternatives.

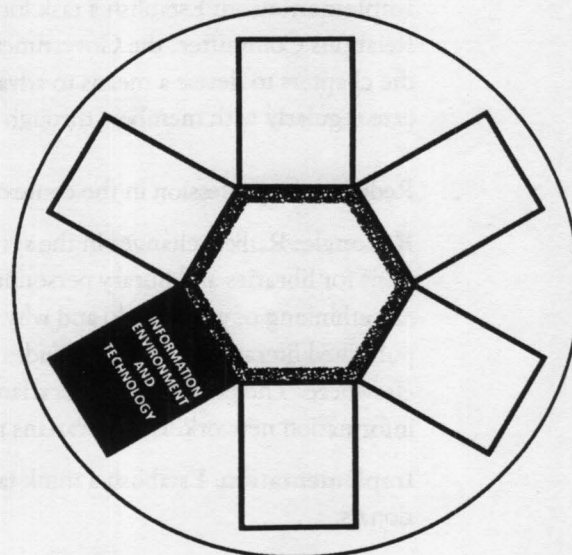
**Implementation:** Ask the Council of Chapter Presidents to study a closer linkage between AALL and its chapters and to present recommendations to the Executive Board.

6. Foster the activities and interests of informal groups.

**Rationale:** Informal groups formed around new or emerging topics have proven to be successful for members.

**Implementation:** Appoint a task force that includes the Treasurer to make recommendations on support and guidelines for informal groups.

## STRATEGIC DIRECTION II: PROVIDE LEADERSHIP TO SHAPE THE LEGAL INFORMATION ENVIRONMENT IN A TIME OF RAPID TECHNOLOGICAL AND PUBLIC POLICY CHANGES



### Description

Make the Association an effective voice to influence those technological and policy developments that are changing the way legal information is delivered, and position our members to respond effectively to the changes as they come.

### Rationale

Law librarians have serious concerns about the developing technology and its implementation. These concerns range from the difficulties of implementing newer technologies to uneasiness about whether these changes will make traditional libraries obsolete. The building of the Internet and similar networks at the state level is completely changing the way government and legal information is created and delivered.

During the period of the last four year plan, the Association began to make its views known in Washington, where technological development and public information policy are becoming increasingly intertwined. That effort should be expanded and refined through the increased education and involvement of our members, the establishment of expanded strategic alliances, and the expansion of efforts at the state and local level. Through its activities, the Association will prepare its members for new roles as information professionals in the electronic environment.

The impact of this strategic direction is fundamental, because these developments are reshaping the legal information environment. Improved access to legal information by our members and the general public is vital.

### Initiatives

1. Promote and support national, state and local initiatives to advance electronic dissemination of legal and other relevant information.

**Rationale:** Effective and affordable access to legal information is a primary mission of the Association. Producers of legal information should be encouraged to provide such information electronically, and consumers of legal information should have the means to obtain it electronically.



**Implementation:** Establish a task force that includes representation from the AALL Government Relations Committee, the Government Documents SIS, and government relations committees of the chapters to devise a means to advance electronic dissemination of legal information. Communicate regularly with members through the *Newsletter* and other means.

2. Redefine the profession in the context of its changing environment.

**Rationale:** Radical changes in the systems of information delivery are causing fundamental dislocations for libraries and library personnel. For most librarians, these changes will require a fundamental rethinking of what we do and why. The work of librarians is no longer bound by the traditional published literature, but also includes a vast complex of information emerging on the Internet and elsewhere. The profession of librarianship must evolve to meet the new challenge of this expanding information network. Law librarians must become navigators of the new superhighways.

**Implementation:** Establish a think tank for law library leaders and other legal information professionals.

3. Expand strategic alliances with other associations and groups to promote the public policy agenda of the Association.

**Rationale:** Efforts in Washington have been effective in a general alliance with other library associations. AALL needs to expand its alliances now by developing stronger relationships on information policy issues with the American Bar Association, the Association of American Law Schools, and various judicial organizations, as well as with networkers and other information providers.

**Implementation:** The Executive Director, the President, the Washington Representative, and the Assistant Washington Representative will work with the Government Relations Committee and other groups and associations to establish new relationships in this area.

4. Convene a national conference on legal information issues.

**Rationale:** AALL has a strong role to play in partnership with other groups in the legal and information communities to further the advancement of knowledge about and access to legal and government information. AALL will establish its role as a leader in this arena by bringing these groups together to share common concerns and to plan further cooperative efforts.

**Implementation:** President, Education Committee Chair, and special task force will arrange for conference to be held in conjunction with the 1995 Annual Meeting in Pittsburgh.

5. Adopt the Internet as a regular means of communication among members.

**Rationale:** The growing importance of the Internet as a means of communication as well as an information resource cannot be ignored. The Internet will facilitate fast and efficient transmission of information between the Association and its members and among members.

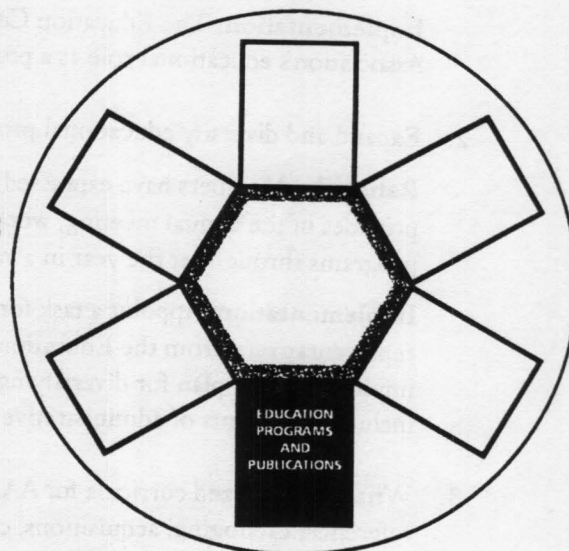
**Implementation:** Encourage all groups within AALL to begin to use the Internet to conduct Association business and to share information by July 1, 1995. Traditional methods of communication will be continued until it is determined that the overwhelming majority of AALL members have access to the Internet. The Association will maintain and distribute a list of mentors who will provide guidance to new Internet users. AALL will include Internet training programs in AALL's educational offerings and will publish helpful articles and tools for members.

6. Set up an electronic information resource managed by AALL Headquarters, thus enhancing the existing use and value of AALLNET to the members. [AALLNET was formerly called LAWNET.]

**Rationale:** Such a resource will provide rapid access to AALL information for our members. It will create an opportunity for discussion groups for people of similar interests, for members of committees, and for the Executive Board. It will also provide a gateway into other locally developing legal information systems.

**Implementation:** Executive Director will present a plan to the Executive Board on the staffing, resources, and funding needed to set up a server at AALL Headquarters for the storage of AALL-related information as well as for making other relevant information available to the members. The plan will also explore alternative options.

### STRATEGIC DIRECTION III: INCREASE AND DIVERSIFY AALL'S EDUCATION OFFERINGS TO MEMBERS AND NON-MEMBERS



#### Description

Set educational standards for entrance into and credibility within the profession and devise a course of study leading to credentialling.

Provide members with readily available, high quality, and timely continuing education programs, publications and services in a variety of formats, using all available technologies.

Provide non-librarians and non-members who use legal information with readily available, high quality, introductory and intermediate basic education in legal information resources in a variety of formats and using all available technologies.

#### Rationale

There is an expressed need for more and different types of educational programming and educational materials. Annual meeting programs and workshops are available only to those who can attend the conference. Institutes are very focused educational experiences that reach a small audience. The demand is great for regional programming, with a variety of topics and formats, that could reach members and non-members. Publications that result from these educational offerings or are produced separately can satisfy some of the demand. AALL needs to create more educational opportunities to serve its members and to become the primary provider of education in the management and use of legal information.

The issue of basic education for the profession is of continuing concern to the members of the Association. Lack of requirements or a list of basic competencies for the designation of professional law librarian has harmed the prestige and credibility of the profession. At the same time the decreasing number of library schools has made it difficult or impossible for many to obtain the M.L.S. or equivalent degree. AALL needs to address this issue in its educational plans.

#### Initiatives

1. Develop an educational policy statement.

**Rationale:** The Association does not have a statement of its educational mission. It is imperative that the Association describe its mission and how its educational offerings will support the Association's members in the workplace.



**Implementation:** The Education Committee will draft a document that clearly states the Association's educational role as a professional society.

2. Expand and diversify educational programs.

**Rationale:** Members have expressed a need for more types of programming than AALL now provides in the annual meeting, workshops and institutes. They have asked for local and regional programs throughout the year in a variety of locations and formats.

**Implementation:** Appoint a task force consisting of staff, the Treasurer, the Vice President, representative(s) from the Education Committee, and three members-at-large to develop an implementation plan for diversifying the educational offerings of the Association. The plan will include statements of administrative and budgetary impacts.

3. Write standardized curricula for AALL to offer basic law librarianship courses such as legal reference, cataloging, acquisitions, collection development, and administration.

**Rationale:** Standard curricula are easier to replicate and will enable AALL to diversify and repeat its offerings. This is one of the areas of highest need expressed by the members. Such courses will prepare those who function in the legal information environment and who may not have had the opportunity to take such courses in other settings.

**Implementation:** The Education Committee will oversee this process. The Committee will consider a variety of alternatives, including the appointment of curriculum committees and the possibility of contracting with library educators.

4. Sponsor a credentialling program in law librarianship.

**Rationale:** Credentialling by associations can encompass both certification of individuals who have been tested for proficiency and accreditation of educational institutions that have been approved for certain courses of study. Individual members and focus group participants identified this as a desirable program for law librarians.

**Implementation:** The Education Committee will review the programs of other associations and develop a plan for implementing a credentialling program for AALL. The plan will include statements of administrative and budgetary impacts.

5. Sponsor a credentialling program for law library assistants.

**Rationale:** A growing number of paraprofessionals hold key positions in law libraries of all types. Some educational programs exist for library assistants, but none are targeted for those working in law libraries.

**Implementation:** The Education Committee will review the educational needs of law library paraprofessionals and develop a plan for implementing a credentialling program for AALL. The plan will include statements of administrative and budgetary impacts.

6. Revise the annual meeting program selection process to assure program slots for the Special Interest Sections.

**Rationale:** This will allow for more targeted and specific programs and greater responsibility for the SISs.

**Implementation:** Provide each SIS with the opportunity to present programs of its choosing at the annual meeting. The Education Committee will work with the SIS Council Chair to determine the number of program slots to be made available to each SIS and will oversee the process for managing the annual meeting program.

7. Build the Association's reputation as the preeminent source of information about law libraries, legal information, and the legal information profession.

**Rationale:** The Association should be a significant resource for the legal information community. The development of tools to assist those working in the legal information profession will solidify AALL's position. Such tools may include booklets, bibliographies, topical studies, an information and referral system, a clearinghouse, an electronic network, or any number of print or electronic sources. There are many opportunities for Special Interest Sections, committees, caucuses and individuals to contribute to this effort.

**Implementation:** Appoint a task force to study and make recommendations.

8. Evaluate current publications for their perceived value and relevance to the membership and recommend changes, improvements, or alternatives.

**Rationale:** Members have questioned the value and usefulness of current publications. Electronic publication is a rich and growing opportunity. Information must be available in a more timely and less costly manner.

**Implementation:** Charge the Publications Policy Committee and the *Law Library Journal & AALL Newsletter* Advisory Committee with evaluating existing publications and recommending to the Board the elimination, expansion, alteration or addition of publications.

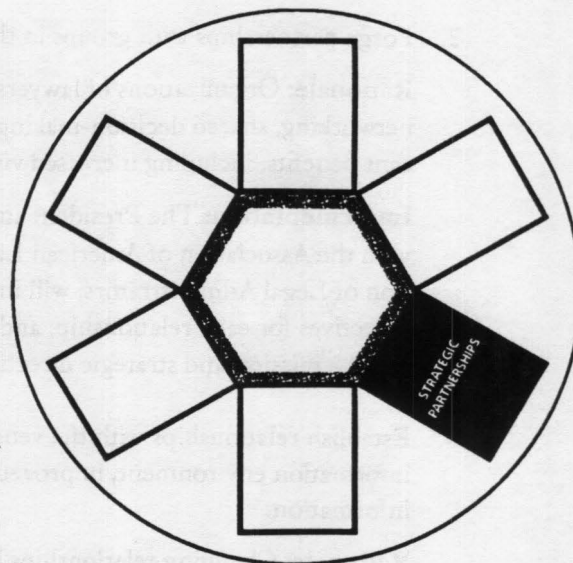
9. Use the *AALL Newsletter* to institute a series of timely, trend-setting articles on the practice of law librarianship.

**Rationale:** Members have indicated that the *Newsletter* is important to them and would be an even more useful publication if it included timely articles concerning the daily practice of law librarianship.

**Implementation:** Manager of Publications and Public Relations will develop plan with the Executive Director and the *Law Library Journal & AALL Newsletter* Advisory Committee. Publish at least one practical and/or provocative article in each issue of the *AALL Newsletter*.



## STRATEGIC DIRECTION IV: ENCOURAGE AND SUPPORT STRATEGIC PARTNERSHIPS AND PURPOSEFUL EXCHANGES WITH OTHERS



### Description

Increase the Association's outreach activities to selected outside organizations, by sending delegates or official representatives to them and by inviting them to participate in AALL. Through partnerships or alliances with organizations that have common objectives, AALL may gain from shared knowledge, resources, and expertise and may develop collaborative programs.

### Rationale

The need to form partnerships pervades everything we now do or might consider doing in the future. Strengthening this area of activity holds great promise and will enable the profession to be recognized as a preeminent source of expertise in the field of legal information. The time is immediate, because so many others recognize its importance and are willing to engage in collaborative activities.

Partnerships increase our ability to influence others, to bring more diverse and informed points of view to discussions and planning, to blend our concerns and needs with those of other groups, and to increase AALL's influence and understanding of its environment. The types of alliances and the specific organizations selected should be evaluated for their strategic importance and for their effectiveness.

### Initiatives

1. Develop a policy concerning strategic partnerships and exchanges.

**Rationale:** The Association does not have a statement of its goals, objectives, and criteria in regard to partnerships and exchanges. It should describe these relationships and their benefits to the profession of law librarianship.

**Implementation:** A special committee of the Board, supplemented by the Washington Representative and one other Representative, will be appointed to draft a document that clearly states the Association's reasons for engaging in collaborative activities.

2. Forge partnerships with groups in the legal information community.

**Rationale:** Organizations of lawyers, judges, law faculty, and others offer opportunities for networking, shared decision-making, support for AALL's public policy efforts, and other significant benefits, including increased visibility for our members.

**Implementation:** The President and a special Board task force will review current relationships with the Association of American Law Schools, the American Bar Association, and the Association of Legal Administrators; will investigate relationships with others; will set criteria and objectives for each relationship; and will review each relationship for its value and relevance to AALL's mission and strategic directions.

3. Establish relationships with the vendor community that promote a dialogue on the evolving information environment, improved information products, and fair and reasonable access to information.

**Rationale:** Changing relationships between law libraries and suppliers of legal information make the need for communication among all parties more critical than ever. Issues such as licensing, copyright, document delivery, Internet resources, and preservation of electronic information are important to libraries and vendors alike. AALL can facilitate communication and collaboration to address these issues.

**Implementation:** The President, the Executive Director, and the Committee on Relations with Information Vendors will identify and pursue strategic partnerships in the vendor community.

4. Review representations that involve SIS participation.

**Rationale:** Many of the representations to various working groups of other associations involve the participation of one or more SISs.

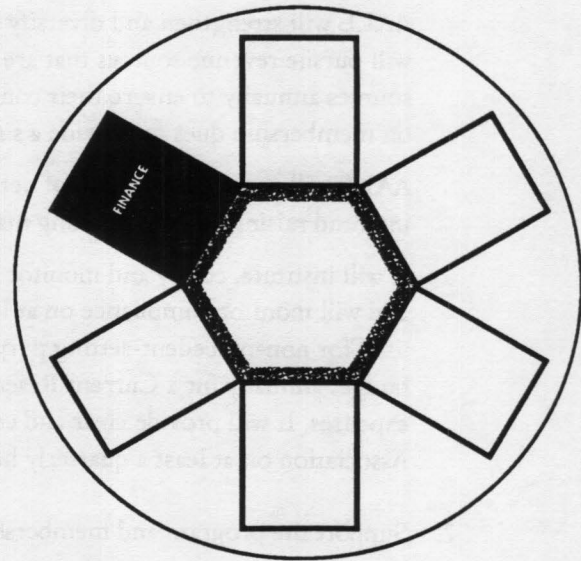
**Implementation:** Form a task force of several SIS leaders, the chair of the SIS Council and at least one representative of the Board to clarify issues of funding, reporting, and representative responsibilities and authority.

5. Re-evaluate all representations on a triennial basis.

**Rationale:** It is important to have clear objectives for each representation established by the Board so that we gain the greatest benefit from our investment. Because such representations have developed over a period of time, often as requested by member groups, the strategic reasons for each relationship have not been identified, and there are no criteria for the establishment of new relationships. Each relationship should be reviewed for its value and relevance to the AALL mission and strategic directions.

**Implementation:** The current representative and a designated Executive Board member will review criteria/ objectives and make recommendations to the Board.

## STRATEGIC DIRECTION V: CREATE FINANCIAL STABILITY TO SUPPORT THE PROGRAM AND MEMBERSHIP THROUGH WISE USE OF RESOURCES



### Description

Emphasize financial stability by building reserves, strengthening and diversifying revenue sources, encouraging growth, establishing and following sound financial policies and balancing budgets. Support program and membership by funding activities that further the strategic directions, thereby ensuring that the strategic plan drives the budget. Provide excellent operational resources, services, and staff to support AALL's programs and activities. Use resources wisely through prudent management, continuous quality improvement at Headquarters, and by providing adequate support for all ongoing and new initiatives.

### Rationale

Every organization must provide for means to support its activities. A strong financial position will ensure that a variety of revenue sources will be available to allow AALL to meet the needs of members. The impact of this strategic direction is extremely great, since it affects all aspects of the organization. The immediacy of this strategic direction relates to taking charge of finances before financial difficulties arise.

### Initiatives

1. Create financial stability.

**Rationale:** Stability of financial resources underlies all programs of the Association.

**Implementation:** AALL will build reserves sufficient to maintain the Association's financial health by clearly defining its funds and their uses. A Current Reserve Fund will enable AALL to operate at current levels of service, based on an annual analysis of the risks in revenues in the General Fund. A Capital Reserve Fund will be used to furnish and improve space and purchase capital equipment, based on analysis of future needs. AALL will reinvest a portion of the interest from the Permanent Investment Fund, according to its policy. An Endowment Fund and its subfunds will be restricted funds received by the Board for specific purposes, such as scholarships, awards, and visiting lectureships.



AALL will strengthen and diversify revenue sources to provide financial growth and stability. It will pursue revenue sources that are consistent with its mission and review existing revenue sources annually to ensure their continuing reliability and potential for expansion, but will rely on membership dues to provide a significant source of revenue.

AALL will encourage growth of net revenues by developing new products and services, increasing fund raising, and broadening markets through innovative and creative efforts.

It will institute, codify and monitor clear financial policies. It will have annual balanced budgets and will monitor compliance on at least a quarterly basis. Current Reserve Fund monies will be used for non-precedent-setting purposes when authorized by the Executive Board. AALL will budget annually for a Current Reserve Fund at least equal to the estimated risks in revenues and expenses. It will provide clear and concise budget reports to the key financial players of the Association on at least a quarterly basis.

2. Support the program and membership.

**Rationale:** AALL places support of the program and membership at the core of all its activities. Financial management is designed to support programs, not to be an end in itself.

**Implementation:** The AALL budget will be driven by its strategic plan. AALL will maintain an appropriate balance among those programs that 1) generate net revenue, 2) require full financial support, 3) require partial subsidy, and 4) break even.

AALL will maintain an appropriate balance among supporting ongoing programs and activities, implementing the strategic directions, and responding to exceptional opportunities.

AALL will support its programs and activities with excellent operational resources, services, and staff. It will keep pace with the growth of the membership and changes in the information environment and technology by investing in the operational infrastructure and in technology to support the needs of the organization and its members.

3. Use resources wisely.

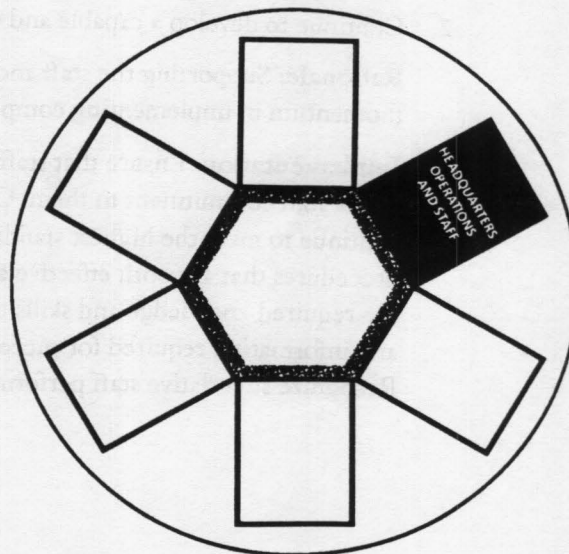
**Rationale:** The wise use of resources is necessary to maximize the resources available for member activities.

**Implementation:** AALL will manage association finances prudently by analyzing and allocating appropriately the direct and indirect costs of all services, programs, and activities. It will also develop a pricing policy that considers all these costs, as well as value to members and other customers. AALL's policies and procedures will be codified in a Policies and Procedures Manual. Key financial players of the Association have been identified and will receive clear and timely financial information.

AALL will invest in continuous improvement of quality in Headquarters operations and staff, by supporting continued staff development and training and developing excellence in the application of new technology. AALL will maintain a facility that presents an image of professionalism and quality and that provides staff a safe and comfortable work place

AALL will provide adequate support for all ongoing and new initiatives by requiring analysis of staff and Headquarters costs in all proposals for new projects and providing additional resources when necessary to support new or expanded services.

## STRATEGIC DIRECTION VI: BUILD A SUPERLATIVE ASSOCIATION AND HEADQUARTERS OPERATION



### Description

The members' strategic directions and related operations will serve as the driving forces in setting priorities and in the execution of all assignments, tasks, and activities. The Headquarters operation will function to exceed members' expectations of their association in terms of responsiveness to their needs and ongoing effectiveness.

### Rationale

The Headquarters operations and staff complement the time and energy of the member volunteers, who are a large and rich resource whose limited time must be utilized wisely. Headquarters must keep pace with the growth in membership and the increase in activity.

AALL's strategic directions must be used as a standard for evaluating activities, procedures, staffing arrangements and assignments to ensure that the strategic directions are implemented.

### Initiatives

1. Create an increasingly responsive Headquarters operation.

**Rationale:** Headquarters operations and staff are essential resources which provide the infrastructure for association programs and activities. This resource is limited, therefore Headquarters operations must be focused on the strategic directions and on programs and activities that will have a high impact and make a difference to the membership.

**Implementation:** Re-energize, refocus, reorganize and re-tool Headquarters staff and internal operations. Ensure that all policies, practices and procedures are responsive, first and above all, to member priorities, expectations, needs and interests. Guarantee that all programs and services meet or exceed the highest quality expectations of the members. Provide appropriate technology and other resources to ensure excellence.

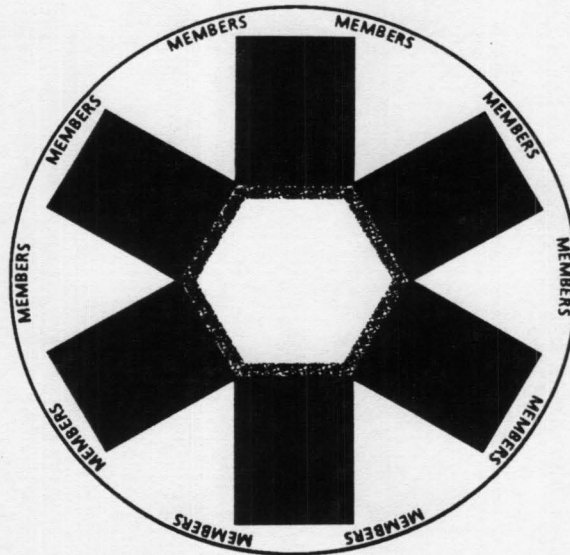
2. Continue to develop a capable and committed Headquarters staff.

**Rationale:** Supporting the staff and physical resources at Headquarters is required to maintain momentum in implementing complex plans that require long term commitments.

**Implementation:** Ensure that staff is informed of the strategic directions of the Association and foster staff commitment to them. Guarantee that currently successful products and services continue to meet the highest standards of timeliness, completeness and accuracy. Develop procedures that are both effective and utilize resources prudently. Hire and assign staff that have the required knowledge and skills to address the strategic directions. Provide staff with the skills and information required for success by providing technical and managerial training necessary. Recognize superlative staff performance.



## IMPLEMENTATION AND EVALUATION



How will AALL implement and evaluate this plan? The plan sets out strategic directions and suggests a number of initiatives to support those strategic directions. These initiatives will require the AALL President to appoint task forces and to make new assignments to various existing groups. This will take place over the four-year period covered by the plan.

By employing the umbrella strategy, described earlier, the plan also encourages grass-roots initiatives in support of the strategic directions. These may take the form of educational programs, publications, SIS or committee projects, proposals to the Executive Board, or other mechanisms.

The Budget Committee will allocate resources according to the priorities identified by the Board and in response to requests from members. The 1994-1998 strategic plan does not lay out priorities or a specific calendar, but a number of initiatives have been identified for the first year of the plan. A strategic planning committee of the Executive Board will recommend a timetable for further work. This committee will also communicate with the members on a regular basis about progress on the initiatives and proposals for new initiatives.

The success of the plan will be monitored by the results achieved. Special task forces will report on their findings, and the sub-units of AALL will continue to submit annual reports on their work. There will not be an elaborate reporting structure like the one that evolved with the first long range plan, although a grid or other simple tool might be used to tabulate accomplishments. The results will be evaluated based on how well they further the strategic directions of the plan and how closely the Association resembles the desired future identified in the vision statement. Regular analyses and comparisons of resource allocations will be additional indicators of the changes in the budget brought about by the strategic plan.

The implementation of an innovative strategic plan provides many opportunities and challenges for AALL. The Executive Board looks forward to working with AALL members to meet these challenges and to further the mission of the Association.