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REFLECTIONS ON THE LIFE OF A PRIVATE LAW LIBRARIAN OR LONGEVITY AND RELEVANCE IN AN AGE OF CHANGE

Text of the 2007 PLL-SIS Annual Meeting Luncheon Keynote Speech

July 15, 2007, New Orleans, LA

by Kay Moller Todd, Paul Hastings Janofsky & Walker LLP, Atlanta, GA

My purpose today is threefold. First, Chris [Christine L. Graesser, PLL Chair] asked me to describe my current responsibilities as a private law librarian. Second to discuss longevity—more surviving—as a librarian at one firm. And third to reflect on the differences between law librarianship at for-profit organizations versus non-profits.

I. Current Responsibilities

My title is Senior Legal Researcher, and I am in the Atlanta Office of Paul Hastings Janofsky & Walker. My responsibilities are divided between management of the library and its staff, and work for the Employment Law Department by providing statistical analysis of employment-related actions, such as layoffs and promotions, and the development of affirmative action plans for clients. The staffs for the two responsibilities are separate. The library staff includes two other professional librarians, and there are four analysts with expertise in statistics who report to me for the labor-related work.

The Atlanta office is a branch office with approximately 115 lawyers. I joined the firm almost 25 years ago, and at that time there were five lawyers in Atlanta. My job description was the idea of one lawyer who was thinking outside of the box. With only five lawyers, he needed a law librarian who could contribute to revenue. His vision was that clients would pay for librarian time if it was marketed based on our expertise, as being done cheaper, faster, and better. My position was set up with a billable hours expectation, and my salary was based on the standard billable hours times rates equation that firms use for lawyers. As the Atlanta office grew and the work increased, we added staff for reference and administrative functions.

With the volume of my work for the Employment Department, my library oversight now is less in the day-to-day details, and more at a strategic level. This is the

appropriate time to introduce Scott Snipes, who is my Associate, and who handles both reference and administrative duties.

My work for the employment department began when a client needed to provide to a federal agency statistical information on the participation of minorities in its workforce. The request came to me because I had compiled statistical information before in response to research requests. That single project led slowly to other analyses and projects, including analyses of proposed layoffs, and the development of the narrative and statistical affirmative action programs that are prepared by federal contractors and other organizations that have a diversity focus.

It is not unusual for law firm library directors to have responsibilities outside of the library—to have oversight over Records, for example. What is different in my situation is that my additional responsibilities have kept me on the revenue side, which is consistent with the focus that my position has had from the start. What is important, I believe, is that the additional area of focus for my department came as a natural corollary to the research commonly done by law librarians, and builds upon skills we all have.

My work for the employment department has broadened my statistics knowledge, and given me additional opportunities—but many of those are in areas that are not unfamiliar to librarians: selecting software, conducting training sessions, and direct interaction with clients. Many of you have engaged in similar activities. There is an interesting cross-over now between the two parts of my staff--the librarians and the statistical analysts. The analysts come to the librarians for statistics on college graduates, specialized census data, and questions about the latest federal regulations. The librarians draw on the spreadsheet and graphing skills of the analysts.

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Fall: August 15 **Winter:** November 15
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FROM THE CHAIR

by Lucy Curci-Gonzalez, Kenyon & Kenyon LLP, New York, NY

Lagniappe is New Orleans Creole for “an extra or unexpected gift,” like a bakers’ dozen. Since we have wiped off all the powdered sugar from the dozens of Café du Monde’s beignets devoured during July’s AALL meeting, let us consider the lagniappe benefits of our AALL Special Interest Section, The Private Law Libraries.

The Special Interest Sections (SIS’s) allow Association members to participate in smaller groups that deal with specialized areas of law librarianship. What else could be the best way to continue our learning, connect with other practitioners, and, primarily, just enhance our practice of Private Law Librarianship than by participating in an AALL special interest section developed solely for that purpose?

One gift of being a member of PLL, and in AALL in general, is the opportunity for continual learning. According to a case study presented by the American Society for Public Administration on the value of membership in professional associations, “Ninety-five percent of associations offer education programs to their members, making associations the primary professional development resource for America’s workforce post-college.” (Wendy Hayes and Antoinette Samuel. “The Value of Membership in Professional Associations - American Society of Public Administration: A Stellar Case in Point.”

www.park.edu/icce/files/civic200603.pdf). In the same case study, the ASPA authors state that “[t]he ability to learn is the single most important skill individuals and organizations need to thrive amid rapid change... [A]ssociations need to shift from providing ‘continuing education’ to facilitating continuous learning.” Through AALL’s special interest sections, we can participate together in building a culture of continuous learning. We can learn from programs and seminars, but we can also learn from other members.

Our members are our greatest asset, but further to that, another “lagniappe” of membership lies simply in our amazing diversity. We can help each other build strong practices and networks using this diversity – of knowledge,

experience, educational backgrounds, regional and cultural differences and more – as a resource. One never knows what he or she can learn just by reaching into the unknown. PLL-SIS members are encouraged to volunteer to serve on PLL-SIS committees and groups. Through those, members can develop lasting bonds and further enhance the networking ability that just being a PLL-SIS member already provides.

The PLL-SIS already has a few things on tap for the coming year. We are scheduled to participate in Professional Legal Management Week (see <http://www.plmw.org/>) during the week of October 1-5, 2007. The founders of PLMW envision it as an endeavor to provide “a forum for recognizing those in legal management for what they do and the role they play in the success of the organization, and in its service to its clients and those who work in the organization.” One of our PLL colleagues, Mark Gediman, has an article, “[Walking with Librarians: A Unique Journey.](#)” published in the premier issue of ALA’s new *Professional Legal Management Week Magazine*. As I write this, the PLL Education Committee is submitting a number of member driven educational program proposals to AALL for the 2008 Portland meeting. Look to our website for new content in anticipation of a redesign of the site.

If you like free things, then the lagniappes that come with being a member of the PLL-SIS are certainly for you. Let’s continue to build this association and continue our learning - for ourselves, for our clients and workplaces, for our profession, and definitely for our peers.

Many thanks to Donald Boman, Kenyon’s Technical Services Coordinator for his able assistance editing this column.

Reflections on the Life of a Law Librarian, *continued from page 1*

My responsibilities developed in a somewhat serendipitous way, but there are other practice areas where law firm librarians can and do provide similar practice specific information that is critical and valued. When that connection to a practice group is ongoing, it reinforces the perceived value of the library.

II. Remaining at one Firm

Let me first qualify this discussion by saying that remaining at one firm for a long time is 90 percent luck. Firms merge with others and librarians may be among the redundant staff in the merged entity. An economic downturn leads to layoffs. Firms lose a prime client and downsize. Firms lose a practice group and downsize. Firms face a large malpractice judgment and go out of business. Partners disagree and the firm fragments. And too often, a Machiavellian manager is hired who decides to hire a director who is loyal to him or her—or worst of all, decides that the library can operate without professional librarians. These bad things happen to good librarians. Second, I don't endorse staying at one firm for an entire career—and actually Paul Hastings is my second firm—but where the work remains stimulating, then remaining at one firm can be a good thing. I conducted an informal survey of four colleagues who have long tenure with their firms—asking what enabled them to stay there. Their thoughts and my own experience shaped the following guidance as to why librarians choose to stay or are permitted to stay at a firm:

1. Good firm/Good people—Staying at a firm where the culture is compatible, non-lawyers are treated as contributors to the quality of the firm's practice.
2. Paranoia—This is my terminology—but it refers to the recognition that we are vulnerable every day. One colleague talked about proving himself every day. That “edginess” and insecurity, I believe, leads to a continual need to excel to validate one's existence. And my hypothesis is that this enables us to meet expectations.
3. Excellence—A commitment to provide excellent service—one colleague commented that “I ran a superior library...provided top quality reference service. Delivering information worth having.”
4. A Changed Person/A Changed Job—For each of us the job changed and is not the one we started with. One colleague commented on the need to be proactive in the face of change.
5. Fiscal Responsibility—Being cheap or as one said, “I was very careful with the firm's money.”

III. Librarians at For-Profit Organizations

The vast majority of us became librarians for far nobler goals than the ones we now acknowledge in the law firm world. We must measure our success within the framework of the business of the law firm. In order to be

taken seriously by the firm, we must demonstrate an understanding of the business or we will be marginalized. We are all service-oriented, and we all probably agree that our success is dependent on the quality of the service we provide—but it must be what they perceive to be service. Much of what we do to maintain the collection—print and electronic—will never be understood or appreciated by management—the service they measure us by is on the reference side. The for-profit world demands business skills of us, and most of us have to acquire those skills on the fly. What are the key skills that we need?

1. Business writing—Succinct, making it clear what outcome we want, providing executive summaries, giving them the sound bites they need, writing to persuade others to act as we want them to act.
2. Financial reporting—Isolate what can be predicted, identify the key forces, always offer alternatives (you will like your alternatives better than the ones they come up with).
3. Act like a player—You are in a supporting role, but they give Oscars for those too! I sometimes think some lawyers think of support staff as the great unwashed populace, so it is helpful when they see we have table manners, and have conversational skills. But seriously, engage in small talk, comment on things you saw related to one of their clients—careful here—follow-up on work you did for them, be prepared when they ask what's new in the library, to have a nugget about something creative you did or a new development. Supply targeted information—recognize the cost of their time and their limited attention span.
4. Anticipate the next big thing—If you think you will need to downsize space, start to get a benchmark of how easy and what. If office copy costs are a significant and growing expense, develop a plan of attack.
5. Never say no. Just say yes!—A colleague described her staff as having “rarely if ever told a lawyer sorry we can't find that for you.” Give them an option for getting a hard to find resource—sending someone to another town—hiring a local information specialist. Demonstrate an entrepreneurial attitude. Agree to accept a responsibility that other departments are having trouble with—we read court calendars for an area calendar each day looking for the firm and its lawyers—because that county does not send out calendar notices. Agree to provide onsite hospitality with a large business development event the firm is hosting. Take over updating a document that one department uses—for us it is a record retention guide for employment lawyers.
6. Enjoy what you are doing.

2007 AALL MANAGEMENT AND LEADERSHIP INSTITUTE: A REVIEW

by Andrea L. Hamilton, Faegre & Benson LLP, Boulder, CO and
Michele A. Lucero, Thomson West, Los Angeles, CA

On March 5 through 8, 2007, the American Association of Law Libraries sponsored its first Management and Leadership Institute. Held in Tucson Arizona, the program was attended by 35 law librarians from throughout the United States. The Institute was envisioned and organized by Michael Chiorazzi, Associate Dean for Information Services, Professor of Law and Information Resources and Library Science at the University of Arizona James E. Rogers College of Law. The Institute was facilitated by Maureen Sullivan, described in the program materials as “an organization development consultant whose practice focuses on the delivery of consulting and training services to libraries and other information organizations.” (For more information, see www.Maureensullivan.com.) According to Celeste Smith, Education Manager, AALL, “Maureen Sullivan is the best in the business! She is highly sought after and we are extremely privileged to have her as facilitator.” Those who attended the Institute know this statement is true. Maureen put together an excellent agenda for the session, full of relevant and practical topics, making the most of every minute of her four days of presentation time.

The sessions addressed these topics: *Management and Leadership: Principles, Practices and Competencies*, *Developing Effective Interpersonal Relationships*, *Juggling: Learning the Art (and Science) of Management*, and *Transforming Libraries: Inspiring Change*. An ambitious set of objectives was presented to the participants on the first day and every one of them was expertly addressed during the course of the Institute. Maureen ably—and almost singularly—kept the attention of the participants during the entire Institute, making a seemingly impossible task look effortless.

The Institute opened by defining the competencies of the effective “managerial leader”, which include such skills as networking, negotiating, and budgeting. The discussion then transitioned from the theoretical to the practical: how to determine one’s own strengths and weaknesses in each of these areas and how to develop needed skills.

While there are many tools for self-evaluation, Maureen suggested the “Leadership Behaviors Organized by Practice” checklist contained within *Leadership Practices Inventory, Third Edition, Participant’s Workbook*, by James M. Kouzes and Barry Z. Posner. Those completing the 30-point checklist were asked to rate themselves in the following areas: “Model the Way”, “Inspire a Shared Vision”, “Challenge the Process”, “Enable Others to Act”, and “Encourage the Heart.” The following steps were then suggested to help develop those skills in which one determined herself to be weak:

1. Review your results
2. Identify where to focus
3. Talk with others to gain their perspectives; learn from them
4. Set goals
5. Develop a plan
6. Identify sources of support

This teaching approach—going beyond the theoretical into the realm of the practical and the personal—was one of the primary reasons this Institute surpassed other similar sessions.

The second day focused on interpersonal competence and how to take into account the human factor while becoming an effective managerial leader. One of the most practical topics covered was the importance of active listening and the use of the following effective techniques to convey to others that you hear and understand what they are saying: use of open-ended questions, paraphrasing, helping to clarify, asking others how they were affected, and suggesting resources.

During the Institute, participants routinely broke into small groups for further discussion, to receive assistance with an actual work situation, or to receive input on a personal development plan. The groups were often divided by type of library institution. This strategy aided with transitioning from the theoretical to the practical, providing valuable time for introspection and feedback from colleagues, and it allowed time for networking.

The third day of the Institute consisted of learning the art and science of management. Topics included the strategic planning process, essentials of project management, budget issues, and proactive problem solving. Participants learned that the strategic planning process involves many key steps to ensure proper planning. It is important to know your organization’s mission and to make sure the library mission is aligned with that of the organization. A manager should examine the external world to determine trends and developments in the field as well as develop a vision. The vision should be a picture of what the library aspires to do. The manager should include the staff in developing the vision. The manager should also align the library’s plan with the larger institution’s plan and get involved at all levels. S.W.O.T. analysis is an excellent tool to identify the key Strengths, Weaknesses, Opportunities, and Threats to an organization. Goals and objectives should also be developed to help guide the library. These should be S.M.A.R.T.: Specific, Measurable, Action-oriented, Realistic, and

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Timed/timely. Monitoring and marking progress on a regular basis is important to see if the library is on target. The strategic plan should be a working document which can be revised as needed. An assessment process should be part of the strategic plan to determine if goals have been met. Rewards and recognition should tie into the achievement of the goals.

The topic “Budgeting to the Plan” was presented by Shelley Phipps, Assistant Dean for Team and Organization Development at the University of Arizona Library in Tucson. Shelley pointed out that integrated financial management involves planning what to do, planning how to do it, developing costs associated with the plan, providing the resources, proactively tracking the project, and evaluating the results. In order to develop a budget proposal, one must determine what you want to do (i.e. determine the desired result), why you need to do it (i.e., customer need, process improvement, competency development for the future), and, what is needed to do it (i.e., type of financial investment, help, specific timetable). One must also consider how the results will be evaluated. Shelley provided insight into the types of accounting and how to create a budget proposal.

The third day ended with a discussion on project management and problem solving skills. We learned the simplest project management model is P-D-C-A (Plan, Do, Check, and Act) in a circular cycle. The basic stages in project planning include defining the project, planning the project, implementing the project, and evaluating and closing the project. A formal project team may also need to be designated. Roger Kaufman, in his book *Identifying and Solving Problems: a System Approach*, offers the following six-step model for solving problems:

1. Identify a problem based on needs
2. Determine solution requirements and identify solution alternatives
3. Select solution strategies
4. Implement
5. Determine effectiveness
6. Revise as required

The fourth day of the Institute involved discussion on transforming libraries and inspiring change. Topics analyzed included team development, motivating and building commitment to change, how to stay motivated and energized, and how to position for promotion to library management.

In team development, members often enter a team with different feelings and thoughts. The team leader needs to provide direction during team formation. Competition and conflict may arise among team members. In this stage of “storming”, coaching is required by the team leader. The team must focus on

problem solving in order to grow and evolve. The leader should guide, clarify, explain, and direct. In the next stage of “norming”, the group develops cohesiveness and trust. The leader provides support and encouragement and promotes discussion. The final stage of team development is “performing”. In this stage, there is high productivity and the leader is able to delegate. The team sets out to accomplish its goals. Throughout this process and in order for team meetings to be effective, ground rules should be established, tools should be available to break out and brainstorm (such as flip charts), and the roundtable technique may prove useful to offer everyone the chance to contribute.

The second topic of day four—that of change in the workplace—is one of the most difficult issues to face. Maureen provided tips on how to build commitment to the change. First, to help staff understand change, they need to be made aware. They need to be allowed time to understand and vent their frustrations. Management should allow staff to express their feelings, and to recognize what the change is and how it will impact their unit. In the library world, work continues to change and leadership is very important. Librarians need to focus more on our users as changes occur within our organizations. Managers need to take time to recognize and inform those of the change.

Motivation was also discussed on the final day. Three main areas motivate people at work: desire to satisfy personal needs, work itself, or expectations, especially those of supervisors and colleagues. Managers cannot motivate anyone, but can set up opportunities in the workplace by creating the conditions that allow individuals to tap into their own motivations. What motivates one individual may not motivate another. Practical steps to motivate individuals include being committed to yourself, knowing your employees, and focusing on what your employees need.

The final topic of the Institute involved positioning for promotion, which includes these key ideas:

1. Perform beyond expectations
2. Show initiative and be proactive
3. Build relationships and network
4. Get involved; volunteer for committee project work
5. Commit to continuous learning
6. Collaborate (write and publish)
7. Communicate with the boss and toot your own horn; engage in self promotion
8. Create an annual report
9. Utilize the newsletter
10. Let them know you want to be promoted
11. Report on professional activities
12. Be positive and a team player
13. Keep your chin up and be persistent

FILE WRAPPERS? ARE THOSE, LIKE, PEOPLE WHO BUST A WICKED RHYME ABOUT PAPERWORK?

by Anne N. Barker, Townsend and Townsend and Crew LLP, Palo Alto, CA

In the winter 2007 issue of *Perspectives*, Amanda Merk provided a [primer on "prior art references"](#) and many of the resources used to obtain them. Another specialty document that intellectual property (IP) librarians are often asked to obtain is the patent file history. Patent file histories, often referred to as patent file wrappers, contain all of the correspondence between the patent office and the patent attorney or agent representing an inventor from the filing of the initial patent application to the granted patent. The file history maintained by the patent office is the "official record" of the prosecution history of a patent application.

File histories may be used in infringement research during litigation. *Black's Law Dictionary, 8th edition*, defines "Prosecution-History Estoppel" (also called "File-Wrapper Estoppel") as:

the doctrine limiting a patentee's invocation of the doctrine of equivalents by eliminating from the claims those elements that the holder surrendered or abandoned during the prosecution of the patent. (p. 591)

In other words, if, during the application process, an applicant neglects to disclose to the examiner that something is part of the invention (or states that it is not relevant), they cannot later state that it is when bringing an infringement lawsuit. File histories may also aid in interpreting the claims of a patent. Applicants may make express statements to the issuing patent office regarding the scope of the patent's claims; a review of the prosecution history can assist the court in determining the meaning of the claims. Additionally, file histories may be used in validity research; the file history is examined to determine if the patent examiner missed relevant prior art that might invalidate the patent. File histories may also be used to aid in writing a new application or to understand why an examiner granted a particular patent.

Because it includes the original application submitted by the applicant, including copies of any cited prior art references, the file history can be a good place to find hard-to-locate materials, such as unpublished articles, old data books, and product brochures. Patent applicants who wish to claim priority to an earlier application must include a copy of that priority document in their filings to the patent office. Therefore, file histories can also be the only place to obtain a copy of an unpublished (abandoned or withdrawn) patent application.

So, where do you go to get a copy of the file history?

The Free Sources

You're in luck if you're looking for recent U.S. patent file histories. Effective July 30, 2003, the USPTO began implementing the Image File Wrapper (IFW) system. The IFW system stores and maintains file history records electronically and has replaced paper file histories. Public access to the IFW system was launched in July 2004 and it includes the file histories of all patent applications that have been opened for public inspection filed on or after June 28, 2003.

Just search for your patent in [Public PAIR](#) (Patent Application Information Retrieval system) and click on the Image File Wrapper tab to view and download the filings and correspondence in the file history. If you do not see an Image File Wrapper tab, then the electronic copy of the file history is not available for that application.

Similar to the Public PAIR system, the European Patent Office (EPO) has their own database called [Register Plus](#) which includes the information previously available via the Online European Patent Register and Online Public File Inspection. File histories dating back to January 1, 1998, as well as files with a notice of opposition received after October 15, 2001, are available. Register Plus includes European patents and patent applications, as well as PCT applications which include the EPO as a designated state in which protection for the invention is sought. Once you have located your patent, click on "All Documents" along the left-hand side of the display to open the application file. When you open this section, you can view and download the available documents in the patent's file history. The images database that hosts the file wrapper documents is only available during the EPO's office working hours. These are: Monday to Friday (except public holidays), 8:00am to 6:00pm CET (11:00pm to 9:00am PST). However, sometimes you can get lucky and access the documents outside of these hours.

For PCT applications that do not designate the EPO, some file history documents may be available through the PCT's [PatentScope database](#). Once you have located your patent, click on the Documents tab along the top of the record. Although limited documents are accessible, the priority document is available for PCT patent applications filed from January 2001 and can sometimes be the only place to obtain a copy of an unpublished patent application. See <http://www.wipo.int/pctdb/en/content.html> for further information on the coverage dates of various aspects of the PCT file history.

Since May 1, 2007, documents in Japanese file histories that were written after July 2003 have been available via the Japan Patent Office (JPO)'s free

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“[Industrial Property Digital Library \(IPDL\)](#)”. Searching for Japanese patents can be a tricky business and, unfortunately, the electronic file histories currently can only be accessed via the Japanese page of the IPDL. However, a [step-by-step guide](#) is available from the EPO to walk you through the process.

The EPO has also created a [step-by-step guide](#) on using the online register of the Korean version of [KIPRIS](#) (Korea Intellectual Property Rights Service). The Korean version of KIPRIS provides direct access to the online electronic register for file histories of patent and utility model applications filed from 2000 onwards.

As you start to look through the lists of documents available from the above sources, you will likely notice that there are some items that are not available. The Public PAIR system will list them as NPL (non-patent literature) documents but they are not available for download. The other systems will not list them at all. These NPL documents (the prior art references Amanda wrote about) are not available through government-sponsored systems due to copyright concerns.

Fortunately, the Information Disclosure Statement (IDS), the List of References Cited by Examiner for U.S. patents, and the International Search Report for EPO and PCT patents, list prior art references cited by the applicant and the examiner and are available as part of the file history. Referring to these lists, you can utilize the prior art resources Amanda wrote about to obtain the documents. Or you can use a vendor to obtain them directly from the patent office.

Vendors

File histories can be ordered directly from the issuing patent office; however, ordering documents through these government agencies can lead to long wait times. For instance, an electronic file history [ordered from the USPTO](#) costs \$55.00 (paper copies cost \$200), but the processing time is 25 days. I don't know about you, but my attorneys usually can't wait 25 days to get their requested documents. Although they are still bound by the file's availability from the patent office, vendors can facilitate much quicker turnaround times.

There are several vendors available from whom you can order file histories. There are many more than I've listed below, but these are the major providers. Many vendors have databases on their Web sites of previously supplied file histories that they have warehoused. You can search these databases to determine if they already have the file history on-hand which should result in a quicker turnaround. However, you should be aware that different vendors have different criteria for checking with the patent office to determine if any materials have been added since it was first retrieved. It would be unusual for the file history of a granted patent to have additional material inserted post-grant; however, if this is a concern, you should check with your supplier to determine what their procedures are for updating previously inventoried file

histories.

Unless otherwise noted below, vendors allow you to choose paper or electronic delivery. Electronic files are usually provided as PDF files and may be ordered as static images or text searchable, with bookmarks available for an additional fee, and can typically be downloaded or shipped on CD-ROM.

Most will also provide cited references, both cited patents and non-patent literature, at your request. You should determine before you order if these documents will be necessary so that you can order appropriately. If there are a significant number of large cited references, including them can increase your cost substantially.

- [Access Patent Group-APG, LLC](#). U.S. file history paper copies are available for \$0.75/page; electronic copies are available on CD-ROM for \$1.00/page for copies with static images and \$1.25/page for searchable versions. The File History minimum charge is \$40.00. There is a \$10.00 cancellation fee if you cancel your order after 1 hour.
- [Advanced Patent Services](#) (Formerly [Fileshopper](#)). U.S. file histories are available for \$1.00/page for copies with static images and \$1.50/page for fully searchable versions. Pricing for foreign file histories varies by country; average pricing is about \$300.00 depending on the country of origin. You may search Advanced Patent Services' Inventory database to see if the file history is already available in their inventory for quicker turnaround.
- [Digipat](#) from Questel. U.S. file histories are available for \$1.00/page for copies with static images and \$1.25/page for fully searchable versions. Bookmarks may be added to PDF copies for \$15.00/file. Foreign file histories are available for a flat price depending on country plus \$1.50/page. Call for a quote. There is a \$50.00 minimum charge per order and a \$35.00 cancellation fee. You may search Digipat's File History Finder database to see if the file history is already available in their inventory for quicker turnaround.
- [Express Patents](#). U.S. and foreign file histories are available. Copies of documents are available electronically on CD-ROM or via internet download. Document fees and availability vary, so contact them for details.
- [Image Applications Ltd.](#) Based in the UK, Image Applications provides electronic European Patent (EP) and Patent Cooperation Treaty (PCT) file histories. EP file histories are available for patent applications and patents having a filing date after January 1, 1998 or where an opposition has been

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filed after October 15, 2001. File histories are available for PCT applications which have entered the regional phase before the EPO after January 1, 1998. Prices are 0.75 GBP per page and they "will endeavor to send you a price quotation within 2 working days of receipt". Please note, this service covers the same dates of availability as the EPO's free [RegisterPlus](#) database. It doesn't seem like a cost-effective choice to me, but you may have your reasons.

- [Information Specialties Corp.](#) U.S. file history paper copies are available for \$0.90/page with a \$50.00 minimum if the order is under 50 pages; electronic copies are available for \$1.00/page for copies with static images, \$1.25/page for non-searchable versions with bookmarks, and \$2.00/page for searchable versions with bookmarks. There is a \$100 minimum charge for electronic file orders under 100 pages. International patents are available for \$4.00 per page (paper copy only). Additional charges apply for electronic or CD versions.
- [MicroPatent](#) from Thomson Scientific. U.S. file history paper copies are available for \$1.00/page; electronic copies are available for \$1.25/page for copies with static images and \$2.50/page for fully searchable versions. The File History minimum charge is \$45.00. MicroPatent charges a base rate of \$75.00 for EP and NL file histories plus \$1.60/page and fees; all other foreign file histories start at a base rate of \$125.00. MicroPatent's electronic files include internal hyperlinks. You may search MicroPatent's File History Inventory Lookup database to see if the file history is already available in their inventory for quicker turnaround. If you search in [Delphion](#), file histories can be ordered right from your Delphion Result Set using the File Histories tool tab, from the order form, or directly from your Delphion Integrated View.
- Patent Imaging Corporation ([The Patent Bank](#)). File histories are generally provided in electronic form from Patent Bank's online archive of file histories. U.S. file histories available in the database cost \$0.50 per page for static images and \$0.60 per page for searchable PDF. U.S. file histories NOT available in the database cost \$0.75 per page for static images and \$0.85 per page for searchable PDF. Foreign file histories cost \$2.50/page. If you choose to have the file history delivered as a CD-ROM, the cost is \$1.00/page plus an additional \$0.45/page for a paper copy to be included. There is no minimum order amount.
- [PatentOrder](#). Minesoft's PatentOrder, which requires a contract, is usually used for downloading patents,

but EP file histories are also available for immediate download. PatentOrder uses the EPO's RegisterPlus to acquire the documents so non-patent references will not be included. But you can access PatentOrder 24 hours a day so you don't have to worry about the limited hours of service for RegisterPlus' image database. To order EP file histories by patent number, simply input the ESP@CENET patent number format preceded by PWEF (e.g. PWEF1000009). To order EP file histories by application number, input the ESP@CENET application number format preceded by FWEF (e.g. FWEF19990402065). Finally, as with RegisterPlus, you may find PCT applications which include the EPO as a designated state; you may only use the PCT application number to do this in PatentOrder, not the publication number. Input the ESP@CENET application number format preceded by FWWO (e.g. FWWO1998US04141).

- [Patentec](#). Patentec can provide U.S. file histories in paper or electronic formats. The cost for paper copies is \$15.00/file plus an additional \$0.75/page. For electronic files, static images cost the same as paper copies; searchable PDF costs \$25.00/file plus an additional \$1.25/page.
- [Prior Art Searches](#). U.S. file history paper copies and electronic copies with static images are available for \$1.00/page for first 400 pages, \$0.75/page thereafter; searchable electronic copies cost \$1.10/page for the first 400 pages, \$1.00/page thereafter. There is a \$40.00 charge for estimates which is waived if the file is ordered. Pricing for foreign file histories varies by country; call for a quote.
- [ReedFax](#). U.S. file histories are available electronically for \$1.25/page for copies with static images and \$2.00/page for fully searchable versions. REEDFAX can provide most foreign file histories for \$2.00 per page plus actual shipping. The file history minimum charge is \$35.00.
- [RWS Group](#). U.S. file history paper copies are available for \$1.20/page; electronic copies are available on CD-ROM for \$1.80/page for copies with static images and \$2.25/page for searchable versions. German, European, French, and British file histories cost \$1.20/page for paper copies, 1.50/page for static images, and \$1.90/page for searchable PDF. Prices and turnaround times for file wrappers in other countries are available upon request. There is a \$90.00 minimum charge per order for paper copies and a \$160.00 minimum for electronic copies. RWS can also provide a summary of the contents of the ordered file wrapper. The summary can be in English, German, or French as required. This service may be

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particularly useful in the case of foreign language files. They also have a Status Watch service that can supply regular updates from specific files, keeping you up-to-date on any additions to the file.

- [Thomson Scientific](#). If you order a lot of file histories, you might want to consider Thomson's new file history management and hosting service. Thomson will store, organize, and make searchable the full-text of any file history you order from this as yet unnamed service. If they already have the file history in their database, you can download the inventoried version immediately. Upon questioning them at AALL, I was assured that they would also immediately check with the PTO to ensure the file's completeness and send an up-to-date final version shortly thereafter. Thomson provides coverage of international files to over 40 countries. The intent of the hosting service is to create a central repository for all file histories ordered by your firm. You can also upload and download files to and from the portal from your own network, allowing you to consolidate all of your previously ordered electronic file histories in one place. You will then have access to your archive of file histories,

organized in directory folder structure, with the ability to search across these directories for specific files. You can also annotate and add searchable keywords and share files, folders, and comments with others in the firm as well as to clients. All electronic files are basic OCR searchable. Thomson is also offering Premier OCR Searchable PDFs which have expanded search capabilities including proximity and Boolean operators. Finally, each electronic file history ordered automatically includes a free family report with a complete INPADOC family list for your patent. For each family member you will see U.S. litigation information, U.S. post-issuance assignment data, U.S. post issuance data, maintenance fee status, and legal status.

Obviously, your choice of vendor will depend upon your firm's needs. You may use one vendor for U.S. file histories and a different one for foreign projects. A bare bones provider may meet your needs or you may decide a service with a few more extras available is the way to go. In any case, with all of these resources at your disposal, you should have no trouble filling requests for file histories whether you get one request a year or your attorneys provide an endless supply of these projects.

The 2007 AALL Management and Leadership Institute was well-organized, both logistically and educationally, with ample opportunity to network and meet some great colleagues from around the country. It was a wonderful and exciting four-day opportunity. Attendees left with a great sense of satisfaction and were inspired to apply everything they learned in their own workplaces. Thanks are due to Michael Chiorazzi, Maureen Sullivan, and Celeste Smith.

RIDING THE CI WAVE: HOW TO HANG TEN AND IMPLEMENT A FIRM-WIDE CI SOLUTION WITH MINIMAL RESOURCES

reviewed by Janice Collins, Sonnenschein Nath & Rosenthal LLP, Chicago, IL

Presented by:

Mark A. Gediman, *Coordinator, Best Best & Krieger LLP*

Kimberly Abbey, *Competitive Intelligence Consultant*

Donna Cavallini, *InfoFirst LLC*

Cynthia Cheng Correia, *Knowledge InForm, Inc.*

Karin Donahue, *DLA Piper*

Marsha Fulton, *Thompson Coburn LLP*

Gregory R. Lambert, *King & Spalding LLP*

Jan M. F. Rivers, *Dorsey & Whitney LLP*

Mikala C. Stewart, *Kirkland & Ellis LLP*

Linda G. Will, *Dorsey & Whitney LLP*

This five hour Competitive Intelligence (CI) workshop was held on Saturday, July 14th. The speakers were an impressive mix of independent information providers and librarians. The program opened with Mark Gediman and Marsha Fulton discussing how CI is defined by the Society of Competitive Intelligence Professionals (SCIP). Mark Gediman aptly defines CI as “Information gathered and analyzed with the purpose of making the firm more competitive and profitable in an ever changing marketplace.” This section concluded with a synopsis of the three recent surveys done on CI.

The panel featured Cynthia Cheng Correia’s excellent overview of getting started as a Competitive Intelligence professional in the law setting. Discussion included the two applications of CI in a law firm: CI in the business of law and CI in the practice of law. Cynthia also discussed the characteristics of CI in law firms, stating that it is usually an outgrowth of established functions such as business development, market research, or librarians and information services. New CI professionals in law firms need training and knowledge in the areas of intelligence practices and applications, adequate support and

champions among upper-level managers, and greater understanding of organizational values and applications. Cynthia also suggested resources to help get the newer professional up to speed including SLA materials and the CI listserv from AALL. Cynthia also discussed what makes a good CI professional. The most important characteristic is the ability to perform analysis, not just gather information.

Cynthia’s closing remarks addressed common pitfalls of CI. These include inadequate preparation and resources, failure to interact with top management and key users, failure to deliver the product on time, and not meeting the expectations of the requestor.

Karen Donahue led the section on marketing. Without a good marketing plan, no matter how good your CI program is it will not flourish. The CI product becomes the brochure. The skills of the staff must be emphasized. Reach out to departments such as marketing.

The closing section presented CI professionals who detailed their career paths. Jan Rivers credits her degree in journalism for the ability to analyze information in a concise way. Marsha Fulton credits developing the library into a profit center at Arthur Anderson for her success as a CI librarian. Greg Lambert used a time of upheaval at his firm to his advantage in starting the CI program at King & Spalding. Mark Gediman’s story of starting with one attorney and working nights and weekends until he was able to hire a full time CI Librarian was inspirational. These war stories are a testament to the dedication of these librarians to achieve their goals.

LEGAL INFORMATION: GLOBALIZATION, CONGLOMERATES AND COMPETITION--MONOPOLY OR FREE MARKET?

reviewed by Beth Maser, The History Factory, Chantilly VA

Presented by:

Kendall F. Svengalis, *Rhode Island LawPress*

David Anthony Szwak, *Bodenheimer, Jones & Szwak, LLP*

LaJean Humphries, *Coordinator and Moderator, Schwabe Williamson & Wyatt, PC*

Ken Svengalis set the tone of this session with a telling slide. The big three legal publishers, Thomson, Reed Elsevier, and Wolters Kluwer, control roughly 85 percent of the market. Together they are an oligopoly. Svengalis also went on to discuss how the publishers draw the libraries in with deep discounts on the initial print version of a book, but derive approximately 85 percent of their profits from the continuing supplementation costs. Ken also went so far as to warn librarians about "special promotions" by publishers, stating that the discount is trifling compared to the profits of future supplements.

The presentation slides detailed price increases, in percentages, for a ten-year span, 1995-2006. He mentioned that the average increases should stay around 4-5 percent but major publishers have kept them at rates hovering between 8-11 percent annually. Many libraries cannot afford these increases and have since canceled certain subscriptions. In fact, some libraries have had to go from maintaining a national collection to a state only collection due to the continued price increases.

From there Ken went on to discuss Library Management Agreements (LMA). He argued that they are designed to keep customers in the dark through confidentiality agreements and mentioned that he knew at least one librarian who refused to sign one. A LMA is generally written for a three-year period. Two-year LMAs are only written with management approval and one-year LMAs are not written. Svengalis believes that in dealing with LMAs, "transparency is your friend," and that these pricing plans are anti-competitive.

Svengalis believes that AALL is unwilling to confront publishers like Thomson-West on this issue. He discussed

the ineffectiveness of the AALL Price Index Committee, which is currently publishing their index without Thomson-West titles and prices. "With the removal of the world's largest legal publisher, the AALL Price Index is now a futile exercise, methodologically unsound, and statistically meaningless."

Svengalis believes that consumers need to be able to have access to accurate annual costs, but they need to "clean the decks" first to get rid of peripheral subscriptions. He also is adamant that no confidentiality clauses are signed. In lieu of the larger legal publishers, he mentioned CASEMAKER, an online legal research service that is run by state bar associations. He noted that since its inception 28 state bar associations have joined the consortium. The additional cost for each bar member is between \$4-20 per year. This is significantly less than online subscription services. The beta testing of cross-file searching is going to be available to public law libraries and staff for a fee. The cost will be much lower than what these institutions are currently paying for most electronic databases.

David Szwak spoke next. David is a longtime consumer advocate from Louisiana. He views the big three legal publishers as a monopoly and believes they are operating as such. He noted that with the appointment of an attorney from a noted law firm, the Federal Trade Commission has not been as vigorously promoting the filing of antitrust actions under President Bush.

The program was well attended and brought up some interesting points of discussion. In a nutshell, Svengalis feels people need to get talking and start some open discussions. Also, AALL should not be afraid of getting involved in these discussions. The only way to change these practices is to become more actively involved with them.

ANNUAL REPORTS: FROM HO HUM TO HURRAH IN 5 EASY STEPS

reviewed by Roseanne Shea, Proskauer Rose LLP, New York, NY

Presented by:

LeJean Humphries, *Coordinator and Moderator, Schwabe Williamson & Wyatt, PC*

Robert Oaks, *Latham & Watkins LLP*

Carol N. Rogers, *Latham & Watkins LLP*

I'm still not quite sure you can create an annual report in 5 EASY steps, but I came away from this program with some great ideas on what can go into an annual report and how to make the process as painless as possible. Carol Rogers and Robert Oaks from Latham and Watkins reviewed their annual report process. Their goal was to use this as a tool to unify the reporting being done throughout their library and records organization, and use this procedure to build morale and camaraderie within the group, furthering the "one firm" initiative within their firm. Librarians in other organizations might have other goals – reveal department trends, show management what's happening, develop presentation skills, or brand the department. Rogers and Oaks' report was conceived as a joint verbal and written report. The intent was to involve local and global staff. There would be a two-way process of sharing local and global information. All department staff would participate in the presentation within the group.

The first step – Discussion. Who do you talk to? Talk to your administrator, library partner and/or committee to find out what would be worth putting into a report. Talk to the Accounting and IT departments to see what information is available and how to get it. Talk to Business Development – they can help with branding. And don't forget input from your own staff. Discussing what you would like to accomplish with others will give you a better idea of what is possible and worth including in the report.

The second step – Gathering Information. Monthly reports, general ledger, variance reports and other accounting reports provide basic information that will show trends, etc. Lexis, Westlaw, BNA, and other major vendors will give you information on what publishers are doing. External sources such as ALM or Ken Svengalis' book, *Legal Information Buyer's Guide and Reference Manual*, will show you trends in the legal industry. You can also contact vendors to find out about future price increases and directions in the industry. At Latham, they compiled a data book to use as a tool to create the reports.

Third step – Analysis. Analyze the information you've gathered. Become comfortable with Excel and learn the chart function. One good chart with many bullet points does much more than lengthy, wordy text.

Remember, if the statistics don't make sense, then don't use them. Concentrate on major trends, not minutia, and don't use library "jargon". Senior management is bored by small items and won't relate to circulation statistics. A good example of a chart is office copies expense compared to firm growth. Explain why copies expense has grown – additional titles for new practice groups? Some other examples of charts: cancellation of reporters vs. ALM survey results, statistics broken down by firm offices, average billing rate vs. library staff billing rate, attorney growth in the firm vs. local office growth, library billable hours office by office, Lexis vs. Westlaw expenses and usage. Once you start thinking about the statistics in this way, you'll come up with more ways to use the information you've gathered.

The fourth step – Report Preparation. The library organization accomplishments, goals and future projects should be an important part of the report. This statement will show that you have objectives. It will help in planning and budgeting and will inform staff of what has and will be happening. Accomplishments can include databases added, intranet page enhancements, links found and added, increased Business Development support, recognition for research projects completed, and reference staff accomplishments. For your goals, define the goal, explain what it will change, and discuss implementation and promotion.

Fifth step – Presentation. Latham distributed the report electronically to everyone and did a verbal presentation with PowerPoint slides to each office. The advantages were immediate feedback through engagement of management and staff. They also discovered that some data was too complex and needed to be presented in a more formal report. The advantage of a paper report was the one-time distribution. They found that the electronic version needed some reformatting. The bottom line is to find out what format your management prefers.

One of the audience members asked if there is a time when an annual report would not be of benefit. The answer was to focus on what is of interest to the firm. Librarians may not have the resources or the firm may not be able to provide the information needed for detailed statistics. The report doesn't have to be filled with analysis and numbers. Some key numbers that you are able to compile and a good discussion of goals and accomplishments may be a good starting point for your annual report.

TRAINING: ARE WE MISSING THE OBVIOUS?

reviewed by Cindy Carlson, Thomson West, Washington, DC

Presented by:

Mary Ames, *Coordinator and Moderator*

Donna Ives, *Director, Customer Contact Center, BNA*

Karen Kirk, *Research Specialist and Content Trainer, CCH*

Robert Peters, *Senior Manager for Transactional Law Research, GSI*

This well attended program was billed as an opportunity to identify some common topics or questions to target when preparing training programs and to gain an appreciation for the type of questions a customer service representative is called upon to answer. While the program definitely delivered on its promise to allow customer service representatives to share their most popular or unusual questions received from end users, whether law firm librarian trainers can modify their programs to address the issues raised by those tidbits is another question.

Donna Ives brought two lists to the program. The first was a top ten list of commonly asked questions to the BNA call center. That was available as a handout for future reference, full of the elementary kinds of questions you would expect for a call center to get. That was definitely useful from the training perspective, addressing directly the challenges librarians face with their end-user training. She didn't go over those in depth since they could be referenced later, but spent most of her time going over the top ten most memorable questions received at the call center. One example given was a judge who called the help desk and asked how he should rule in a case! That spoke to the kinds of questions librarians don't often get. While we often say there are no stupid questions, there are some questions attorneys feel more comfortable asking an impersonal voice at the other end of an 800 number instead of asking someone who knows them professionally. While these anecdotes were amusing - and definitely informative about the environment of the call center - they were too far afield from the typical librarian's day-to-day experiences to be practical.

Ms. Ives also offered some excellent advice that rings true for a law library environment:

1. Keep searching simple when training.
 - a. Explain that word searching is often not the most effective method for producing relevant results.
 - b. Use the built-in features of the service in question.
2. Know your audience, new or seasoned.
 - a. Consider the perspective of a print user going to a web interface. Perhaps starting with a site map that lays out the information and options available could be the best approach.
 - b. Seasoned users, by contrast, are generally better with working from the initial customer

interface.

3. Do a needs assessment.
 - a. Listen for cues as you train and assess your trainees comfort level.
 - b. Think on your feet and react to your audience.

That is all good advice but easier said than done. Knowing your audience and doing an on-the-fly needs assessment take practice and experience.

Karen Kirk of CCH also mostly talked about their odd questions – evidently they often get callers who want to know about Publishers Clearing House, for instance. She talked about their users and it was clear that often the questions they get cannot be readily answered by anyone. Some attorneys who call want to explain their entire history, the history of their client, and of their case. One gets the sense that they feel isolated and want someone with whom they can talk. Many call who feel lost and who don't seem to understand how computers and networks and contracts work. As she put it, users don't know what they have or where they should start. They often ask basic questions: How do I print/save? Where do I find something when I have saved it on my PC? Where in my library is this book? Why can't I open this link to a document from a service to which I don't have a password?

The only sound advice Ms. Kirk could offer is to customize users' desktop interfaces as much as possible and continue to work on educating them about the basics of data organization. She also suggests the ten minute rule (call for help if you've tried for ten minutes and aren't finding your answer), though she would recommend having attorneys call her 800 number, whereas most law librarians would probably prefer to have users call a librarian.

Robert Peters spoke very simply to two basics—break down the question and get the complete question. Reference interviews will never go out of style, and it seems that call centers have as many people asking for things other than what they need as we encounter daily in law librarianship. His third piece of advice is to beware of the gossip game.

With the initial presentations done, the audience participated in an enthusiastic Q&A:

Q: How do you get people to attend training?

A: Persuade them you will save them the time they spend in training in their future searches.

One excellent suggestion is to offer users an opportunity to use a service prior to training, but ask that they make a list of the things they can not do or find frustrating, then review those topics during the training session.

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A WIN-WIN PARTNERSHIP: LEGAL EDITORS AND LAW LIBRARIANS

reviewed by Randall J. Thompson, Louisiana State University, Baton Rouge, LA

Presented by:

Lyn Warmath, *Hirschler Fleischer*
 Carol A. Bannen, *Reinhart, Boerner, Van Deuren, S.C.*
 Peggy V. Cotogno, *New Orleans Bar Association*
 John Delavan, *Association of Legal Administrators*
 Joyce Hastings, *State Bar of Wisconsin*
 Catherine Lemann, *Alaska State Court Law Library*
 Travis McDade, *University of Illinois at Urbana-Champaign, Albert E. Jenner Memorial Law Library*
 Caryn B. Persinger, *Virginia State Bar*
 Gail F. Zvirner, *University of Richmond School of Law Library*

And you thought publication opportunities are only available for academics? The presenters of “A Win-win Partnership: Legal Editors and Law Librarians” beg to differ. In an informative 90 minute program, the panel suggested that any law librarian, including private librarians, can publish and they highlighted potential venues and offered tips for where and how librarians can showcase their writing skills. As was made clear in the course of the program, private law librarians can take advantage of publication to increase their visibility within the firm and to enhance their firm’s image to others.

The format of the presentation was that of a panel discussion with each presenter making brief comments about his or her role and experiences in the publication process. This was followed by a general question and answer session. The presenters were a mixture of law librarian authors from firm, academic, and court settings, and editors from bar association and legal journal publications. Several pertinent points emerged relevant to the potential private law librarian author:

1. Publication opportunities exist outside the academic journal. The editors on the panel made it clear that their non-academic publications welcome

contributions from law librarians. They know librarians will produce high quality work and get it in on time.

2. Know your audience. The editors noted their audience consists of practicing attorneys and, as a result, they are not seeking scholarly articles written in “law review-ese”. Rather the editors want short articles focused on addressing the practical day-to-day problems the practitioner faces.
3. Talk to the editor in advance of writing. You may have a great idea for an article, but if the publication has run a recent article on the same topic, the editor probably cannot use yours. The editor can provide you with deadlines and topics of interest before you sit down to write.
4. Read the writers’ guidelines. Most publications have guidelines for potential authors to follow. Editors will expect you to comply with them if you hope to get your article published.
5. Dealing with an editor can be tough. Ideally, editors should be gatekeepers working to keep the article focused on the audience. Sometimes however, they will insist on changes with which the author disagrees. It’s up to the author to then decide whether to accept the changes or forego publication. The author may need the fortitude to walk away.

With helpful hints such as these, any aspiring author attending this session has the groundwork necessary for publication. And remember that in addition to the bar journals and legal association publications the editors mentioned, other publication opportunities, such as newsletters or even *PLL Perspectives*, are available for the budding private law librarian author.

Training, *continued from page 15*

Q: How are trainers trained?

A: Intensive shadow training sitting side by side with someone working at the call center, combined with product training in a classroom environment seems to be the common scenario in the industry. Evidently it takes about

six months for a person to become adept as a trainer.

Overall, I felt this was a successful program though more focused in communicating the differences between the culture of a call center environment and that of a law library than in providing a roadmap for plugging any gaps in law library training programs. It was interesting and amusing, but could have benefited from more focus on practical tips from experienced trainers.

THE CHALLENGE OF ELECTRONIC DISCOVERY: HOW REFERENCE SERVICE, RECORDS MANAGEMENT AND LITIGATION SUPPORT INTERACT

reviewed by Donna M. Fisher, Senniger Powers, St. Louis MO

Presented by:

Lee R. Nemchek, *Morrison & Foerster* LLP
Rachelle DeGregory, *LexisNexis Industry Relations*
John C. Montaña, *PelliGroup, Inc.*

I was apprehensive about reviewing this program because I knew absolutely nothing about electronic discovery except that attorneys seem very concerned about it. After listening to this excellent 90-minute session, I felt much more educated about this topic, as I am sure did all of the other hundred or so attendees.

The speakers were well prepared and displayed considerable expertise. Ms. Nemchek began by saying that electronic discovery and competitive intelligence are two of the hottest topics in the legal world, but many PLL members are not knowledgeable about them because they generally have been handled by litigation support. However, librarians need to be informed about electronic data discovery (EDD) to help advise clients and attorneys on EDD issues, assist with active litigation, assist with attorney writing and speaking requests, purchase adequate materials for the library collection, and aid in developing practice groups. She explained that electronic data discovery goes by many other names, such as electronic evidence discovery, electronic stored information, document analysis discovery, e-discovery, and cyber

evidence.

Mr. Montaña explained what discovery is and the difficulties and costs involved. He stated that EDD is a hot topic for two reasons. First, changes to the Federal Rules of Civil Procedure were a catalyst for interest. Previous Rules did not address or anticipate current technology advances. Second, the Sedona guidelines were issued, giving non-binding but persuasive recommendations to legal experts on discovery issues. These guidelines are unofficial but prestigious and respected.

Ms. DeGregory spoke about electronic discovery "geek talk". She explained how electronic documents differ from other types of documents and how this affects librarians. Electronic documents present unique issues such as their transient nature, the existence of metadata, difficulties with backup tapes, and the tremendously large numbers of electronic documents that are created.

This session was an excellent introduction to electronic discovery issues. The comprehensive bibliography and other handouts will be extremely useful materials for librarians' future reference needs.

FROM LAW SCHOOL TO REAL LIFE: PREPARING NEW LAWYERS FOR THE CHALLENGE OF PRACTICE

reviewed by Kristine Lloyd, K&L Gates, Seattle, WA

Presented by:

Carolyn T. Santanella, *Coordinator, Co-moderator and Speaker, Smith Moore LLP*

Chris Wolf, *Co-moderator and Speaker, Nexsen Pruet Adams Kleemeier*

Thomas Gaylord, *Chicago-Kent College of Law*

Laurence Seidenberg, *Syracuse University College of Law*

As a first-time attendee at AALL, I must admit that I attended every session full of expectation and interest, and this session definitely satisfied my new librarian verve.

The panel was comprised of a nice balance of firm and academic librarians, all with interesting viewpoints on preparing new associates for life after law school. The panelists shared observations based on their experiences. Firm librarians face the challenge of re-training new associates in conducting legal research, while academic librarians struggle for adequate legal research instruction time within the curriculum.

The panelists presented findings based on a survey of legal research skills conducted in both 2005 and 2007. The survey responses corroborate perceptions that there has been a diminution in the ability to perform legal research effectively and efficiently, corresponding with the increasing reliance on electronic research resources. Hopefully, studies such as these will help bolster arguments to administrators for a greater emphasis on legal research instruction at both the academic and firm levels.

To transition between the different segments of the presentation and to demonstrate the current state of the problem, the panelists showed video reenactments of new associates asking cringe-worthy questions, such as “What’s a digest?” or “You mean Westlaw costs money?” Not only were these reenactments entertaining, they also demonstrated concretely the disparity between our expectations and the realities of new associates’ research abilities.

Though the session focused primarily on the problem of unprepared new associates, the speakers initiated a question and answer session by asking what law librarians can do to ensure that incoming associates are adequately prepared to begin their practice. Based on the comments of one audience member, a lively discussion ensued about the need to incorporate legal research into the core coursework. This seems to get to the heart of the matter: how can law students understand the importance of legal research when it is taught without context?

While I may not have come away from the session with any definitive answers, I left buoyed by the discussion and the exciting challenge of influencing change locally. Most importantly, the session highlighted the importance of collaboration between academic and firm librarians in preparing our future lawyers for success.

PLL-SIS PROGRAM: COMMUNICATING OUR VALUE TO MANAGEMENT

reviewed by Greg Lambert, King & Spalding, Houston, TX

Presented by:

Gayle Lynn Nelson, *Moderator, LexisNexis*

Donna Purvis, *Morrison & Foerster LLP*

Steven Lastres, *Debevoise & Plimpton LLP*

The common theme running through the entire presentation was to stop thinking of the library as overhead, and start presenting the library as a valuable resource that assists in the success of the firm. In order to present our value to management, it is necessary to present that value within the framework of the goals, value, and culture of the entire firm.

Donna Purvis discussed the structure of her firm and how important it is to understand the pressures that are being placed on the administrative and C-Level management to be as efficient as possible with the resources of the firm. Build relationships and partner with the practice groups so that the practice groups see you as a valuable part of their team. Build relationships with others on the management side and learn what are the values and objectives they deem important to the firm.

Steve Lastres focused his portion of the session on two categories. First, understanding what are the important focuses of the firm. Learn how the firm presents itself to the public and what others are saying about the firm. By understanding the goals, values, and culture of the firm, you can tailor your communications to fit that structure and be seen as a valuable player in obtaining those overall goals. Second, obtain the metrics necessary to show the value of your department. It is extremely important that value can be presented in a tangible form. Although Steve's mantra is that they provide outstanding service to

their clients (clients being the attorneys in the case), he is determined to present this service in a way that others in management can understand its worth.

One of the primary ways that worth is calculated is by producing timely reports that define what services the department is doing, how much time is spent on these services, who the services affect, and what the costs and rewards are for these services. Again, it is important to present these reports in a way that is consistent with the firm's goals, values, and culture, and in a method that is understandable to those in management and C-Level positions. How much work is the library doing in billable and non-billable work? Has the library contributed to bringing on a new client by providing the necessary resources to the attorneys? How much back office support is the library providing through training and other services? By compiling this information and presenting it in a method that is consistent with the firm's goals, you will have a better opportunity to present your value to the success of the firm.

The rest of the session was spent showing specific examples of how value can be put in tangible form. It was stressed that the library should show its ability to spend wisely, be efficient, monitor closely, and present the value of resources that were evaluated but not purchased. By presenting all of these factors, there will be a better understanding from management that you are working toward those goals of the firm and you are being a steward of the firm's overall goals, values, and culture.

PLL-SIS PROGRAM: VALUE OF CI TO LAW FIRM LIBRARIANS

Reviewed by Greg Lambert, King & Spalding, Houston, TX

Presented by:

Mark Gediman, *Best Best & Krieger LLP, Riverside, CA*
Jan Rivers, *Dorsey & Whitney, LLP, Minneapolis, MN*
Marsha Fulton, *Thompson Coburn LLP, St. Louis, MO*

It was apparent from the standing-room only crowd that Competitive Intelligence is a hot issue within law firm libraries. Mark Gediman discussed the growing desire for firms to build competitive intelligence units and how these units fit best within the library. There is a struggle in some firms between the library and marketing departments about where a CI unit should reside. Mark described the attributes that are desired of CI analysts and found that the common thread was regardless of where the analyst ended up, most firms hired analysts that have library degrees.

The overall consensus among the audience was that a successful CI unit must reach across departments. CI is seen as a way to break down the barriers between departments and stress the need to work together to achieve a common goal. There were examples of where the collaborations between departments had already been established in some firms and that CI doesn't always have to mean one department wins and one loses.

Perhaps the biggest obstacle to establishing a Competitive Intelligence unit within a library is the

challenge of implementing "analysis" into the final product. Librarians have been reluctant to add in their analysis to legal research because they did not want to cross the line between research and practicing law. The panelists discussed the analysis issue and presented analysis as the pivotal piece of Competitive Intelligence.

Objectives for the upcoming year were also discussed, and the audience was invited to contribute to the Competitive Intelligence Caucus of PLL by joining the CIC-PLL listserv, and contributing to the competitive intelligence website. The panel discussed looking at available CI resources and the need to have focused Webinars throughout the year to help improve the skills and understanding of Competitive Intelligence.

The panelists appeared to be spearheading a grass-roots effort to lead those willing to take on the challenge of supporting a CI effort within their law firms. The audience requested that more information resources such as Best Practices guides and examples of deliverables be made available through the caucus website. It was clear that everyone was left wanting more, and the panel set forth the challenge for everyone to contribute to the CI community throughout the upcoming year and to come back next year ready for more.

PLL-SIS PROGRAM: MAKING TIME FOR THE CHALLENGE

Reviewed by Donna M. Fisher, Senniger Powers, St. Louis MO

Presented by:

Blythe McCoy, **Thomson West**

As I dragged myself two blocks from the Convention Center to the Hilton at 4:15 pm on the last day of the conference, I couldn't imagine what crime the speaker must have committed to have drawn such an unenviable time slot for her presentation. Yet five minutes into this session, I and the rest of the attendees were captivated by Blythe McCoy's engaging and energizing talk. Her presentation on time management skills was excellent, and the discussion was still going strong when the session ended after one hour.

Ms. McCoy was confident, energetic, charming, and well-prepared. She is clearly someone who has given a lot of serious thought to developing techniques to be more efficient. Her basic message is to be organized and have structure to your day so you can spend your time on the tasks that most benefit you and your employer. Since there is a finite amount of time, there are two possible approaches to time management: decreasing the amount of

work you do, and working more efficiently. Ms. McCoy suggested myriad ways to accomplish these goals. She discussed how to prioritize work, how to avoid overcommitment, how to identify where your time is being spent, and how to work more effectively. She also discussed goals vs. tasks and how to delegate. She spent several minutes discussing ways to manage email, that great time saver and also terrible time waster. For good measure, she threw in a couple of relevant quotes from Thoreau and Benjamin Franklin.

With most employees having multiple responsibilities both at home and at work, managing time in today's fast-paced world is crucial. The hour I spent in this session was certainly one hour well spent. The only criticism I could offer is that the meeting room was entirely too small for the number of attendees, all of whom must have known beforehand what a great session Ms. McCoy would give.

CONNELL – 2007 – AALL ANNUAL CONFERENCE

reviewed by Margaux Douglas, Drinker Biddle & Reath, Washington, DC

Having attended one professional conference in the past and not considering myself completely new to the profession of law librarianship (3 years and counting), I was wary of attending the Conference of Newer Law Librarians. What was it? What was it supposed to do for me professionally? Many librarians told me how it was a wonderful place to start networking, a place to start learning the ropes of “conferencing”. It was at CONELL where I would make lifelong professional connections. There were two things to attend at AALL: CONELL and of course the famous Thomson West Party.

CONNELL lived up to its reputation. Through a series of introductions, presentations, and activities, the basics of AALL and navigating the conference were covered. It began with a hearty introduction of all of the AALL Board members and a welcome from both the exiting president Sally Holterhoff, and the incoming president, Ann T. Fessenden. Following the welcome, there were presentations on how to suggest new programs at future AALL conferences (Diana Jaques) and how to contribute to AALL Publications (Mark Estes and Janet Snider).

Jennifer Murray gave an entertaining multimedia presentation on how to begin volunteering for AALL. She covered participation in AALL groups, caucuses, and committees. Throughout the presentation, she added suggestions on overcoming some of the anxieties that can accompany volunteering. Following Ms. Murray’s presentation was an invigorating pep rally speech on how to conference by Cornell Winston. He covered the five

things that must be done at AALL: meet five new people everyday, attend one session outside of one’s area of expertise, get free stuff, do something outside of the conference, and most importantly, get ribbons.

Group break-out sessions followed the presentations. The sessions were essentially icebreakers, providing attendees with examples of how to begin networking. The sessions were led by seasoned conference professionals, who provided time for introductions and also responded to questions and concerns regarding the conference. After the group meeting, attendees participated in “Speed Networking” and had the opportunity to visit the “Marketplace” of Special Interest Groups. The Marketplace provided ample information on the various AALL special interest groups. The Speed Networking was set up much like a dating game, in which participants met with one another for three-minute intervals. The goal was to allow the attendees to get to know as many professionals as possible. It often felt like we were being rushed instead of developing meaningful discussions.

CONNELL ended with a lunch and a bus tour of New Orleans. In three hours, it covered everything New Orleans has to offer: architecture, above ground cemeteries, and the depressing aftermath of Hurricane Katrina. After CONELL was over, I was no longer wary and felt prepared to conquer the next three days of AALL.

DO YOU KNOW WHAT IT MEANS TO MISS NEW ORLEANS?

PLL Travel Grant Recipient Dorene S. Smith, Ater Wynne LLP, Portland, Oregon

After spending a few days in the Big Easy for the AALL Annual Meeting, I sure do! I was fortunate to receive a travel grant from PLL which enabled me to attend the New Orleans conference and in keeping with this year's theme, I Rose to the Challenge.

Old South, New Format

The 100th Annual Meeting was the first with the new, condensed format. This year the meeting was held over four days (Saturday through Tuesday), instead of over five days as it has been in the past. The opening reception was held on Saturday night, the opening session with keynote speaker Joan Biskupic was held on Sunday morning, and educational programs were featured during the day on Sunday, Monday, and Tuesday, with the Closing Banquet on Tuesday night. In order to shorten the meeting, two events were eliminated: the Association Luncheon and the second AALL Business Meeting.

I enjoyed the new format and found that it enabled me to attend plenty of programs, visit the vendors in the exhibit hall, and squeeze in some sightseeing and local color, yet not feel that I was out of the office for too long.

Rising to the Challenge: Educational Opportunities

I was very impressed with the strength of the educational programs. "Legal Information: Globalization, Conglomerates and Competition" was a very provocative program. Kendall Svengalis is an engaging speaker and he provided great analysis of how and why legal information costs are rising.

At "Annual Reports: From Ho-Hum to Hurrah", Bob Oaks and Carol Rogers provided a very entertaining and informative look at how they present their reports, what

they include, and suggestions for what information to include to make your report a success.

Of particular interest to those of us in private law libraries, "Copyright Exemptions for Libraries in the Digital Age" was another timely program, discussing the much anticipated (but yet to be released) report of the Section 108 Study Group and how the report will impact the copyright law's library exemption.

In addition to the "official" programs, there were a number of PLL programs that stand out. One I particularly enjoyed was "Communicating Our Value to Management". I came away from the session with new ideas and great tips for raising my profile and showing the library's value to my firm.

Lagniappe

As we all learned in New Orleans, lagniappe is a little something extra thrown in – and that "little something" at the meeting was the opportunity to enjoy the sights, sounds, and tastes of the Crescent City. I made it a point to try out many of the famed New Orleans restaurants and I was rewarded with some of the most delicious fare I have ever tasted. And the nightlife just can't be beat; from the parties on Bourbon Street to the jazz on Frenchman Street, New Orleans is the place to pass a good time!

I had a marvelous stay in the Crescent City and would encourage anyone who hasn't visited in a while to do so. The people were so warm and welcoming, from the taxi drivers to the waiters, to the store clerks, and they all were very thankful to have visitors returning to their city. So go to New Orleans and Laissez les bons temps rouler!

LAW LIBRARIANS GIVE CONSTRUCTION WORK A TRY IN NEW ORLEANS

PLL Grant Recipient Diane Duffey, Habush Habush & Rottier S.C., Milwaukee, WI

Two years after Hurricane Katrina hit, New Orleans continues to rebuild. On Friday, July 13th, I joined a group of about 70 AALL Annual Meeting attendees who took part in a Community Service Project. The project was coordinated by Ron Wheeler to lend Habitat for Humanity a hand with their efforts in New Orleans' upper ninth ward.

The workday began with a safety briefing. We were warned to look out for nails, not to leave hammers where they could fall on people, and to hydrate. With temperatures in the 90s and high humidity, this last directive was actively enforced; mandatory water breaks took place each hour.

About 20 people were engaged for painting interiors. By the end of the workday, they had put two coats of paint on the walls, ceilings, corners, nooks and crannies of two houses which, except for the flooring, made them just about move-in ready. Of the rest of the AALL group, about half spent the day on wall construction.

My contingent was charged with “floor systems.” Since the majority of our group was extremely work-willing but pretty light on home-building skills, the work accomplished was interspersed with a good deal of explaining from Anne, our group leader. She explained not just how to do the tasks at hand, but why they were being done in a particular way. From the importance of “crowning” – the direction of the wood grain for each joist, to various measures being taken because this was “hurricane country” (the houses being built on three-foot stilts with bigger, stronger, galvanized nails being used exclusively), to the trials of building on the given terrain (a swampy mix of sand and peat instead of bedrock), we absorbed quite a bit of information. It proved to be a dramatic shift from the stuff of Westlaw and Lexis databases.

The floor detail worked like this: treated 4 by 4s making up the sill plate bordered the base of the entire first floor, which is about 20' by 50'. We nailed header joists, or the sill, around this base, and then added a series of joists across the entire base at 14-3/8 inches apart (16 inch on center), plus the many smaller spacers which connected each of the joists at intervals of about 5-1/2 feet all the way down the length of the floor base. Although by our lunchtime/snowcone break it seemed to me that the floor

still had a long way to go, by the end of the day it really had begun to take shape.

The neighborhood in which we were working, in the 1900 block of Alvar Street, is called “Musicians’ Village.” Three-fifths of the residents returning to the area are musicians, and the surrounding area will include a music center as well as a park. Following an intense application process, the families whose homes are being built by Habitat for Humanity will purchase these homes basically at cost, which will amount to a monthly payment of about \$500. They also are required to put in 350 hours of “sweat equity,” working both on their own homes and others’.

Habitat for Humanity workers told our group that when they first came to this site, it was “all trees and mud.” Last year in June, the first house was completed. At the time of our visit, some two dozen brightly colored houses surrounded our work area like a basket of Easter eggs. The sight of children chasing each other around little gardens of the lively Habitat homes was an abrupt contrast with the row of gloomy shells of houses across the street which still sat abandoned with their dismal spray painted codes left from rescue and recovery crews almost two years earlier.

After the workday was over and we’d filed back into our buses, the driver of my bus took us to see the hard-hit lower ninth ward, the location of the third levee breach. The area, now desolate and grassed over, had been all homes, he explained. A memorial erected near this site conveyed the impact of the loss of victims there. He told us how a friend of his who lived there remained with nine family members to brave out the hurricane; none survived. Our driver seemed to represent the spirit of most residents: in spite of their sorrow, anger and frustration over their state of affairs, they still are fiercely proud of their city, and incredibly grateful to visitors for still coming to New Orleans. This impressive spirit helped to make it all worthwhile.

By the end of the workday many nails had been hammered in, many acquaintances made, many walls painted, many laughs shared, no librarians injured – and all felt pretty content with their part in rebuilding this corner of the Crescent City.

A RELUCTANT TRAVELER

PLL Travel Grant Recipient Laurie A. Claywell, Kaufman & Canoles, Norfolk, VA

For years I have listened to my colleagues talk about the AALL annual meeting: “You have to go!” Yes, I’m sure it would be educational and rejuvenating but it would also involve flying. In a plane. Thanks but I think I’ll order the tapes. This year, though, I decided it was time to “Rise to the Challenge” and go to AALL in New Orleans. With an ILS conversion on the horizon and all that expertise congregated in one area, it seemed only logical to put aside my irrational but oh so real fear and go.

I have realized that there is almost an art to picking the right programs to attend. The first one that I attended, *Bringing the Library to the User* (improve usability of catalog data), probably had more application to an academic library rather than a law firm but that was okay. My approach to AALL was if I took away one thing, just one thing, out of a session then it was a profitable experience. In this case the “Take Away” was focusing on how your users try to find things and make sure the tool you’re using fits.

Everything Old is New Again: Online Sources of Historical and Government Documents Originally Published in the Pre-Internet Age was my next stop. Cheryl Nyberg, from the Gallagher Law Library, presented a review of web sites that provide access to a variety of older material. Her slides are available at lib.law.washington.edu/~cheryl/2007aall.ppt and include all of the sites she referred to, including Virginia’s own University of Richmond’s World War II collection. Take Away #1: populate your catalog with links to sites with pre-Internet published documents in whatever way it takes to make them findable. Private libraries have a lot of flexibility – take advantage of it. Take Away #2: You never know where you will find something. The example was a French library’s digitization of some Smithsonian annual report documents. Take Away #3: The GPO registry of U.S. Government Publication Digitization Projects, <http://www.gpoaccess.gov/legacy/registry/browse.html>. Unintended Take Away: the overall presentation was an example of good public speaking. The speaker was knowledgeable about her subject and her audience. It was fast moving, conversational, and entertaining with musical interludes to grab your attention. I certainly cannot criticize the presentation but toward the end I did begin to wonder if perhaps there were a few too many graphics and musical breaks. It was after attending the next session, *Multitasking Millennials: Blessing or Curse*, that I realized Cheryl was way ahead of me.

An interesting observation started the *Millennials* session: Is it multitasking or rudeness? Granted, the more practiced you become in something, the less time the task requires which leads to the ability to multitask. But is that student who is text messaging under his desk during class accomplishing multiple tasks or just being inconsiderate of

his teacher?

Millennials have been shaped by terrorism, technology, and multiculturalism. They have been told to be tolerant, to be connected, to achieve – even in utero (headphones piping in Mozart to heighten IQ and get that jump on kindergarten). They have lived very scheduled, structured lives: sports, music lessons, after school activities. Perhaps this has led to a tendency to multitask?

While cautioned not to overgeneralize, the session’s presenters emphasized that the Millennials (formerly “Gen Y,” born 1980 - 2000) prefer self direction instead of a classroom style; guided discovery as opposed to lecturing; visual stimulation, and examples. Trainers and teachers have to grab their attention and keep it. (Okay, Cheryl. Got it!) Take Away: You, the teacher, be the leader. Guide them but don’t dictate. Challenge and respect them. Be flexible. Help them to shift between tasks rather than simultaneous performance so that comprehension is maximized.

Just as the program started with a thought provoking comment, it ended for me with a comment overheard in the hallway (not necessarily regarding the *Millennial* program): “If it’s not working for me in the first five minutes, I leave and go to my second choice. I’m here to learn not to waste time.” The speaker was obviously not a Millennial so I wondered, what does that mean? Does multitasking transcend generations? Don’t teachers have to grab the attention of all of their students regardless of age? Are there really sufficient differences that a separate program at AALL was necessary? Or is it just rudeness?

Instructional Technology in Teaching Legal Research: Tricks of the Trade in the Real and Virtual Classroom initially focused on online teaching from the academic perspective. Just as I began to fear that I had chosen another presentation that would have little application to the law firm environment, a former firm and current courts librarian shared her experiences. In the law firm, webinars or screencastings created with products such as Camtasia and Adobe’s Captivate offer flexibility in training, which is appealing to billing attorneys. The speaker related how a national law firm created a portal on their intranet for summer associates through which they can view webinars on electronic or print resources. Take Away: It may be worth the investment of creating a screencasting, something relatively simple such as PowerPoint slides with a voiceover, for instruction on networked CDs. My multi-office firm doesn’t have a large library staff, and we are given only a short amount of time with new employees on their orientation day. A short online instructional program that users can view at a convenient time and

Continued on page 26

WHAT I DISCOVERED – WHAT I REMEMBERED: REFLECTIONS ON THE 100TH AALL ANNUAL MEETING & CONFERENCE EXPERIENCE

PLL Grant Recipient Crystal Sherman, Riddell Williams P.S., Seattle, WA

This Annual Meeting was hardly my first, but will go down in my personal history book as one of the very best. I am grateful to the PLL Grants Committee and the LLOPS Grants Committee for making my attendance possible. I have found that the Annual Meeting is a great opportunity for discovery and an opportunity for remembering what I already know. The following are my thoughts on this meeting.

I discovered at the Opening Session that Joan Biskupic, the keynote speaker and U.S. Supreme Court Correspondent for *USA Today*, is a great speaker. From her extremely interesting and insightful speech about Sandra Day O'Connor, I learned more about the former Supreme Court Justice than I had read the entire time O'Connor was on the Bench. *I remembered* that attending the Opening Session often sets the tone for the Annual Meeting, and is worth attending.

At the PLL lunch, *I discovered* that Kay Todd has been a pioneer in taking on duties outside of those traditionally performed by law firm librarians, including helping to select software for firm clients. *I remembered* that longevity for law firm librarians (staying at the same firm for many years) is mostly luck, in the face of multiple law firm mergers, economic downturns, etc.

I discovered at the HeinOnline update more about its new, faster search engine than I had been able to read up on since its launch in June. The pages load much faster than the previous version of HeinOnline, due to something the folks at HeinOnline appropriately called “voodoo magic”. *I remembered* how much I love their product and, as a busy solo librarian, how much time I save by subscribing to it.

From listening to Carol Rogers and Bob Oaks talk about library annual reports, *I discovered* new ways to look at creating such an annual report, and that some of my mistakes in the past were common ones. *I remembered* how keeping track of what's happening in my department throughout the year is very important, rather than waiting until the year is over and trying to reconstruct it. Oh! And that “a number by itself has no context”. Thank you Carol and Bob!

I discovered a small publisher who had been previously unknown to me (Jones McClure) that publishes a very useful book of court rules (which I am now considering purchasing for my library). *I remembered* the value of slowing down and taking a little time to have a conversation with the vendors in the Exhibit Hall, rather than joining in the mad dash to enter drawings and pick up goodies for co-workers who stayed behind.

In a session called “Access to Online Court Records and the Challenge to Privacy”, *I discovered* the reasons behind the redaction of personal identifying information that is of record in many court filings. *I remembered* that

just because a patron has a need to obtain some piece of information in a court filing doesn't justify the harm that could come to an individual involved if that information were available electronically. A particularly interesting point was made: although one might argue that any person could find this personal information by visiting the courthouse and examining documents, the likelihood of that actually happening was far less than a nefarious soul attempting to discover the same information from the comfort and protection of his/her own home computer.

I discovered many threats to electronic preservation, such as format obsolescence, internal or external attacks, and a host of “failures” (media failure, network failure, organizational failure, etc.) *I remembered* the value of print libraries, as a wonderful preservation system, with no one central point of failure.

From John Montaña and Lee Nemchek *I discovered* so very much about Electronic Discovery in general, and that in researching it, one must consider at least half a dozen different ways this discovery may be called (e.g. electronic data discovery, electronic evidence discovery, electronically stored information, document analysis technology, e-Discovery, cyber evidence, and so on). *I remembered* that we mustn't necessarily take a patron too literally when s/he asks you to “find me some recent articles about . . .” Synonyms are our friends!

Other things *I discovered* or *remembered* along the way, in no particular order:

At the Opening Event, it actually is possible for me to pass on dessert, especially after having attended two other food events earlier in the evening.

A teensy, weensy muffuletta sandwich can have big taste.

New Orleans frozen daiquiris are very potent, and not as innocent as their “7-Eleven Slurpee” looks might imply. (Are you noticing a food theme here?) New Orleans can be just as hot and humid as San Antonio (and St. Louis, from what I hear!)

Dan Dabney is still passionate about KeyCite, even after 10 years

I have missed former colleagues from another city
My librarian friends from all over are some of the best, and sure know how to *laissez les bontemps roulez!* (if you'll pardon my French)

Sometimes it takes an out-of-town meeting to get to know a colleague from my own community

The people of New Orleans were grateful that we law librarians brought our convention to their city, and that their collective spirit has indeed risen to the challenge.

This article is also being published in LLOPSCited, a publication of Law Librarians of Puget Sound.

NOLA COMMUNITY SERVICE PROJECTS

by Chris Graesser, Brown Rudnick Berlack Israels, LLP, Hartford, CT

One of the most exciting events at the AALL Annual Meeting was the community service projects scheduled for Friday, July 13. I was one of 50 law librarians who volunteered for Second Harvest, the food pantry clearinghouse for New Orleans and southern Louisiana, which happen to be the areas hardest hit by Hurricanes Katrina and Rita. Two years later this area is still struggling to rebuild.

Our bus took us through some hard hit areas of New Orleans, where you could see the high water marks on buildings and FEMA trailers parked in many yards. We arrived at a large warehouse where donated food is collected and organized. Our job was to sort food into categories (breakfast food was mine) as they came down the conveyor belts, and to pack them in boxes to be shipped to neighborhood pantries. It was hot and humid and we worked hard – our 24 member shift packed enough food for 8,000 meals!

We were rewarded with ice pops and a quick trip to the giant walk-in refrigerator, plus the priceless feeling that we had contributed a little relief to the beleaguered residents of Louisiana.

Other volunteer groups worked for the Louisiana State Museum and Habitat for Humanity. The Habitat group built houses in the Musicians' Village. Housing is scarce and expensive in New Orleans, and the many artists who make New Orleans special are especially in need of homes.

You can help by donating food to Second Harvest (no jarred baby food, please) or donating cash. The website is at <http://www.no-hunger.org/donate/donations.htm>. There are plenty of individuals who also come to New Orleans and as part of their vacation volunteer for relief efforts.

The tourist areas are also very grateful for the patronage of visitors. Most of the world famous restaurants are open (K Paul, Commander's Palace, etc.) as well as the House of Blues and other notable hot spots. The French Quarter is up and running, and feels as safe as the last time I was there (in other words, daytime is fine and at night, go in groups). I was especially enamored of the galleries on Royal Street – some of the best art I've seen anywhere.

A Reluctant Traveler, *continued from page 23*

replay at their discretion is definitely something to consider.

While the secondary Take Away is *just do it*, practical advice was given in order to help make it happen.

- Set the stage: unplug your phone, disable IM and e-mail popups, post a Do Not Disturb notice on your door and coordinate with colleagues to cover for you because you are essentially offline during recording.
- Script your webinar rather than doing it on the fly. Insert strategic pauses for easier editing if you have to change a section later. Consider the voice and tone ("channel your inner flight attendant"). Remember to speak distinctly and unhurriedly.
- Short sessions, 30 minutes or less, are appealing to summer associates.
- Consider server space issues as well as your own computer's capacity. Buy-in from your institution's IT department is essential for the support of such projects.

- Captivate is suited to short presentations, not lengthy discussions. It's easy to use and will incorporate PowerPoint slides

So, was it worth hurtling myself through the air at an altitude that birds avoid? The man who had to sit beside me on the return flight would probably disagree but, yes, overall I am glad I attended AALL this year. I can't say that I have marked off Portland's 2008 dates yet on my calendar, but the fact that I add the word "yet" to this statement indicates that what I took away from New Orleans is a solid match for my dislike of flying. My sincere thanks to the providers of the grants that I received which lessened the monetary impact and really made it impossible for me to say "Thanks but I think I'll order the tapes."

This article also appears in the Virginia Association of Law Libraries newsletter.

PRIVATE LAW LIBRARIES SIS BUSINESS MEETING MINUTES JULY 15, 2007

by Lynn Connor Merring, PLL Secretary, Stradling, Yocca, Carlson & Rauth, Newport Beach, CA

The meeting was called to order at 7:40 by Chair Christine Graesser

Chris introduced John Delavan, Director of Publications for the Association of Legal Administrators. John was a speaker at a session on Monday and commented on the shared value of administrators and librarians as strategic assets to firms.

Chris then thanked GSI for sponsoring our breakfast and Trish for acting as our events planner.

Patricia Barbone presented the Treasurer's report. At the time of the meeting we showed a balance of \$45,130.72, but that did not include many bills which had been turned into to AALL Headquarters but not yet deducted from our account because of the turnover in the last year.

James Duggan, VP/President Elect of AALL spoke to the group about volunteering for committees. Last year 40 PLL members volunteered and over 30 of them were placed. The more flexible you are about which committee you will serve, the more likely you will be to be placed on a committee. He also encouraged us all to make suggestions to the nominations committee.

COMMITTEE REPORTS

Education Committee/Annual Meeting

Margarita Bull and Karen Silber reported PLL was sponsoring 1 workshop, 6 official programs and 3 unofficial programs at the 2007 meeting. Mark Gediman led the Competitive Intelligence Workshop.

The new co-Chairs for next year are Jennifer Berman and Rochelle Cohen Cheifetz. They encouraged people to volunteer and suggest program ideas.

There were 2 regional programs this year: a collaboration with SLA (Lynn Fogle), Management (Mark Estes) and Copyright (Chris Graesser). The committee hopes to have more regional programming next year.

Nominations Committee

Jenny Kanji, Chair, reported on the resignation of Riva Laughlin due to family issues. Both of the candidates for Vice-Chair /Chair-Elect were asked if they would be willing to step directly into the role of Chair in her place. Both were willing to do so. A special election for the Vice Chair/Chair-Elect will be held in the fall.

Newsletter

Randy Thompson began by thanking the other members of the committee for their hard work. Four issues were published this year and the IP caucus had a column in every issue.

This is the second year publishing the newsletter

electronically. The Executive Board decided not to charge vendors for their ads; the vendors have expressed an interest in sponsoring the notification e-mail. The newsletter is available at no charge to non-SIS members. It is available in both PDF and HTML, with the PDF version retained in the archives.

Randy issued a call for authors and announced a committee meeting to be held immediately following the business meeting.

Website

PLL started the process of revamping its web site this year, Byron Hill reported. A special committee began an analysis of the current site and changes that are needed to make the site more useful and dynamic. Pin Hsiao-Peng will be stepping down as webmaster, so we have recruited a team of three individuals, led by Ellen Callinan to work on the changes.

Grants

Jane Roth Baugh reported on the award of 5 travel grants. It was suggested we consider increasing the amount of the grants as air travel costs have increased. Jane also invited members to volunteer for this committee, which involves a fairly small outlay of time.

Strategic Directions

Martha Goldman reported on the acceptance of the Strategic Plan:

1. Leadership
2. Membership Participation
3. Education
4. Advocacy

As Goals have been accomplished they have been removed and new goals added

Independents

Nina Platt reported that this committee was in reorganization mode this year.

Records/Conflicts

Lee Nemchek reported that while she will be leaving law libraries, she will remain active in AALL and on this committee.

This year's activities centered on developing the listserv and AALL educational programs. The listserv is sponsored by AALL and included things like notification of ethics opinions and activities of sister organizations.

Continued on page 28

TREASURER'S REPORT

FY October 1, 2005 through September 30, 2006

Prepared by Patricia Barbone, PLL Treasurer, Hughes Hubbard & Reed, LLP, New York, NY

Beginning Balance (10/01/2005)	<u>\$13,310.89</u>
Revenues	
Revenues 2005-2006:	
Advertising	\$2,250.00
Vendor Contributions	\$13,009.83
Dues	\$11,040.00
AALL 06 Registration and PLL Luncheon credit	\$5,520.00
Total Revenues	\$31,819.83
Beginning Balance Plus Total Revenue	\$45,130.72
Expenses	
Expenses 2005-2006:	
Food & Beverage from Ann Mtg (06)	\$12,996.57
Awards	\$1,257.28
Misc. Expenses incl. AV expenses	\$2,192.65
Transportation	\$50.00
Total Expenses	\$16,496.50
Revenue Over Expenses	\$15,233.33
Ending Balance (9/30/2006)	<u>\$28,634.22</u>

PLL Business Meeting Minutes, *continued from page 27*

Lee reported that the second of her books on records management is currently being prepared. Also she is on an advisory board for the ABA Tech show to set up a Records Track of education programs and to write a chapter for "What else can you do with a library degree."

IP

- Jackie Grossman reported the committee's goals:
- to reach out to librarians in IP firms
 - to address education
 - provide social networking opportunities around the country
 - write a regular column for the SIS Newsletter
 - develop the listserv
 - work on programming for the 2008 meeting
- Next year's chairs will be Fran Sheehan and Paulette

Toth

Tech Services

It appears the needs of the PLL Tech Services community are being met by the larger Tech Services SIS. They did sponsor a program for the 2007 meeting and

anticipated about 30 attendees.

At this point in the program, Chris turned things over to incoming Chair Lucy Curci-Gonzalez, who thanked Chris for her service and presented her with a small token of our appreciation.

Lucy then spoke for a few moments about the importance of using the energy in our various constituent groups to reach out into the greater AALL community, specifically other groups we can partner with on joint issues like training new lawyers with the Academic SIS.

Lucy also talked about the upcoming slate for AALL Board and the need for PLL to continue to propose strong candidates.

The meeting was adjourned at 8:34.

Respectfully submitted,

Lynn Connor Merring
Secretary

PRIVATE LAW LIBRARIES SIS EXECUTIVE BOARD MEETING MINUTES JULY 15, 2007

by Lynn Connor Merring, PLL Secretary, Stradling, Yocca, Carlson & Rauth, Newport Beach, CA

The meeting was called to order by Lucy Curci-Gonzalez at 5:32 pm.

Old Business

Strategic Review

Chris is re-working the statements and will copy the Board on the amended Goals. Martha Goldman spoke in support of the ability to be flexible and arrange them to work for the group. Determining the necessary resources is the hard part. Lucy wants us to emphasize what we can make happen.

Committee Reports

These were mostly presented at the Business Meeting; see those minutes for details. Additional reports were presented at this time:

1. Public Relations: No report was provided.
2. Additional Newsletter: There is currently no sponsor for the notification e-mail, although interest to do so has been expressed. Vendor contributions are up now that they are not paying for ads.

Possible suggestions for opportunities for vendors: make a bigger fuss over grant funders. We were reminded all sponsorships should be routed through Kate Hagan at HQ.

The newsletter will have stricter deadlines this year. There will be no photos. Suggestions have been made for a column on blogs and one to answer "Help" questions, with answers published anonymously. Also the editors should approach Kay Todd about turning her excellent presentation into an article.

3. Groups and Caucuses: The Corporate group is currently DOA. CI, Records & IP are all strong. Tech Services is a question mark.

4. Liaisons: SLA is touting a joint vendor project with us. AALL has formal relationships with ALA, SLA, and the Legal Marketing group. Lucy will follow up to see what sort of input they want from us. Should we form a relationship with ILTA? Both Lee Nemchek and Terry Psarras are members.

5. Website: Ellen Callinan has not responded; Byron will check with her. The other members of the group are Jason Eiseman and Lauren Aldridge. The Computer Service SIS has offered to help the other SISs with their Website issues; someone will follow up on that.

For issues involving AALLnet, it is fine to call Chris Siwa.

If it needs to go farther, it should go to the AALLnet advisory board.

New Business

Strategic Directives

This year we will be focusing on education and how to use that to help retain our members.

By-Laws

We need to address officer succession (as do the other SISs). The Special Election for Vice Chair/Chair-Elect will be held in September or October. We need to line up some candidates.

Education

1. There will be new Chairs in January: Jennifer Berman and Rochelle Cheifetz.
2. CLE Committee: there is now a task force at the AALL level; we should investigate combining the two.
3. The board needs to provide some direction to this committee. What do we need to have them do? Should there be an "education czar"?

How can we improve the quality of speakers at our programs? We can invite 2 VIPs to the Annual Meeting – perhaps they can also speak. We can also ask vendors about sponsoring speakers.

Committees

Chairs have been set, volunteers encouraged. Anyone who volunteers will be placed.

Groups & Caucuses

Can non-PLL members belong? We'd like to encourage all comers, but what about headcount issues re HQ? What should be an SIS membership benefit and what should be open to all?

Additional New Business

Do we need a formal budget now that we have more assets?

Meeting adjourned at 6:30.

Respectfully submitted,
Lynn C. Merring
Secretary

PLL ELECTION VICE-CHAIR/CHAIR-ELECT CANDIDATE BIOGRAPHIES

Name: Rebecca S. Corliss

Nomination for which PLL Office: Vice-Chair/Chair-Elect

Current Job Title and Firm/Corporation Name and Address: Knowledge Management Director, Levenfeld Pearlstein, 2 North Lasalle Street., Suite 1300, Chicago, IL 60602

Former Positions: Manager, Library Relations, Thomson West; Director of Library Services, Schiff Hardin & Waite, Library Services Manager, Freeborn & Peters

Education: University of Michigan, B.A. in French; Rosary College, River Forest, IL, M.L.S; Dominican University, River Forest, IL.. M.B.A.

Activities: Chicago Association of Law Libraries, President, 1997-1998. Treasurer, 1994-1996, Co-Chair, Continuing Educations Committee, 1992-1994, Co-Chair, PR Committee, 2003-2007. Special Libraries Association: Executive Board Member, 2002-2003, Chair, Advertising Committee, 1992-1995. Dominican University, Adjunct Professor, 2000-2003. Council Member, T.R.I.P.L.L, 1995, 1996, 2000.

Publications: Co-author, Special Libraries, A Guide for Management.

Statement: As someone who seriously studies the concept of Systems Thinking, I think it is very important for law librarians to see the big picture in all aspects of their profession. We, as part of AALL, are very fortunate to have colleagues in such diverse constitute areas as academia, courts, corporations and competitive intelligence to learn from as their experiences in their daily jobs can impact us.

Name: Tina Dumas

Nominated for which PLL Office: Vice-Chair/Chair-Elect

Current Job Title and Firm/Corporation Name and Address:

Reference Librarian since 1999, Nixon Peabody LLP (formerly Lillick & Charles), One Embarcadero Center, San Francisco, CA 94111

Former Positions:

Reference Librarian, Pillsbury Winthrop Shaw Pittman LLP (formerly Pillsbury Madison & Sutro LLP), San Francisco office 1996 – 1999; Library Assistant/Sr. Library Assistant, Cleary, Gottlieb, Steen & Hamilton, Washington, DC 1993 - 1996

Education:

M.S. in L.S. The Catholic University of America 1996
B.A. Wellesley College 1993

Activities:

List administrator, PLL (selected lists: pll-calr, pll-ec, pll-ipll, pll-km, pll-multilib-l, pll-opll-l, pll-sis, pll-special) 2005-Present; Committee Member, NOCALL Ad-Hoc Strategic Planning Committee 2007-Present; Committee Member, NOCALL Membership Committee 2006-Present; Vice President/President/Past President - NOCALL 2003-2006; Editor - NOCALL News 2001-2003; Committee Member, NOCALL Grants Committee 2000-2002; Chair, SLA Legal Division Membership Committee 2001-2002; Committee Member, SLA San Francisco Chapter Web Committee, 2000-2001; Member, Association of Legal Administrators 2004; Member, AALL 1996-Present; Member, NOCALL, 1996-Present; Member, SLA 1994-Present; Member, Law Librarians' Society of DC, 1993-1996; Member, American Libraries Association 1993-1996

Publications/Presentations:

"Tina's SLA Highlights." NOCALL News. Vol. 21, no. 2. Sept-Oct 2000. pp. 25-26; "President's Message." NOCALL News. Vol. 25, nos. 1-3 Nov-Dec 2004 - May-Jun 2005. p. 1; Presentation: "L-5: Shortcuts for Safer Keyboard Use." AALL, San Antonio, July 20, 2005; Presentation: "How to Search Like a Pro." Find It Free and Fast on the Net National Business Institute Seminar, Oakland, CA, March 16, 2006

Statement: I am running for PLL Vice Chair/Chair Elect because I want to give back to an organization that has provided me with so much support over the years. PLL is a vital organization, and is a model of partnering with other organizations, both inside of AALL and outside. This translates directly to partnering with other departments within our law firms. I hope to lead our diverse constituent groups in continuing our legacy of partnership and cooperation.

TREASURER'S REPORT

Interim Treasurer's Report through March 31, 2007

FY October 1, 2006 through September 30, 2007

prepared by Patricia Barbone, PLL Treasurer, Hughes Hubbard & Reed, LLP, New York, NY

Beginning Balance (10/01/2006)		<u>\$26,634.22</u>
Revenues		
Revenues 2006-2007:		
Vendor Contributions	\$13,700.00	
Total Revenues		\$13,700.00
Beginning Balance Plus Total Revenue		\$40,334.22
Expenses		
Expenses 2006-2007:		
Food & Beverage (voided check)	(\$191.17)	
Misc Expense (voided check)	(\$62.38)	
Total Expenses		(\$253.55)
Excess Revenues		13,953.55
Ending Balance (3/31/2007)		<u>\$42,587.77</u>

PLL PERSPECTIVES

Sarah Mauldin
 Chamberlain, Hrdlicka, White,
 Williams & Martin
 191 Peachtree Street, 34th Floor
 Atlanta, GA 30303