

PLL PERSPECTIVES

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EVOLVE, EVOLVE, EVOLVE

by Rachael Loper, Nixon Peabody LLP, Washington, DC

“**Energize, Explore, Evolve.**” was the theme of the American Association of Law Libraries (AALL) 2008 annual meeting in Portland, Oregon. I was privileged to attend as a guest of AALL because of my role as the chair of the Legal Marketing Association (LMA)’s strategic alliance committee. It was an honor to be invited to represent LMA and I hope to repay some of my debt of gratitude to AALL by putting a few of the things I learned at the conference down on paper for examination and debate.

Aside from doing some informal networking in the exhibit hall (and with far-flung librarians from my own firm!) and looking for librarian/marketer panel ideas for LMA, I mostly spent my time on the competitive intelligence (CI) track, where marketers and librarians are most likely to cross paths. A recent *Law Firm Inc.* poll found that librarians say they spend 17 percent of their time working with marketing. In the same poll, 63 percent of librarians said that they are their firm’s main source for marketing research and 55 percent are the firm’s main source of CI. Based on the remarks from the podium and in the audience, there are still gaps to be bridged between the two disciplines. I hope this article is a step in that direction.

Give the librarians credit.

During one panel there was some discussion around marketing’s tendency to take full credit for ideas and projects in which the library staff has had more than a hand. I’m sure this has happened at most firms and I can say with a dollop of guilt that I have thoughtlessly done this myself. But part of the solution is easy—you don’t get what you don’t ask for. At my first firm, the two head librarians took me aside and expressed in friendly but not uncertain terms that I *would* give them credit and cc them when I delivered the results of a project on which we had teamed. Prior to their direct and reasonable suggestion, it did not occur to me that they needed to be marketed to their internal audiences. It’s the right thing to do; sometimes everyone needs a gentle reminder.

Form v. Function? Form *and* Function!

Another statement from the podium that struck me was from Kitty Schweyer, manager of CI at White & Case in New York. At the outset of her interesting talk on the forms and uses of CI, she remarked somewhat mockingly that, “marketing likes pretty color charts and graphs.” But in her comments Kitty didn’t mention any of the research showing that graphic display of information enhances the swift apprehension of data. I would argue that a large part of what CI involves is sifting through data and bringing the useful nuggets to the surface in a way that is quick and easy for the user to understand. Yes, marketing likes charts and graphs... because they convey information efficiently.

In law firms, librarians are usually told that they are not permitted to do analysis, with a few exceptions. What is different for many legal (as opposed to business) librarians is that now they are being asked to draw some conclusions that reduce risk in decision making. CI practitioners think in terms of value-added results and are focused on delivering analysis and not just information. What are the implications for your firm, and what is likely to happen next? What are the non-obvious trends in recent events?

No one—no lawyer, no marketer, and no business person—wants to receive a “dossier” in the form of a 400-page tabbed and bound doorstop that includes the complete 10K and the last three years’ annual reports but lacks an executive summary. What the receiver essentially hears when this lands in his or her inbox is, “I don’t know what all this means, you figure it out.” A customer service focus demands more.

Are Librarians Currently Doing CI?

One fascinating story came from Paul Morton, a librarian in the market research function at Southern California Edison (SCE). The utility knew that the grocery chain Tesco was planning a raft of new stores in southern California, and they wanted to know exactly where in order to prepare for the expected spike in power usage in those locations. Tesco was not forthcoming about its

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PLL PERSPECTIVES DEADLINES

Fall: August 15 **Winter:** November 15
Spring: January 15 **Summer:** May 15

FROM THE CHAIR

by Tina Dumas, Nixon Peabody LLP, San Francisco, CA

As summer ends, I am recovering from a great conference in Portland, OR, and preparing for fall associates. Sound familiar? PLL was well represented at AALL this year. We had a great Workshop on law firm librarian roles, and the many hats we wear. We sponsored or co-sponsored 8 regular programs, on topics such as competitive intelligence, copyright, patent searching, and strategic planning. One of the programs aimed at solo librarians was simultaneously webcast for those members who were not able to make it to Portland. In addition to regular programs, PLL sponsored at least six other programs that were well received.

Now, we are looking ahead to the coming year. Program proposals for the 2009 Annual Meeting in Washington, DC were due on August 15th. If you submitted a proposal, thank you! We hope that all of the PLL programs will be accepted, but we have other options if they are not.

If proposals are not accepted into the regular AALL programming, we may still be able to schedule them in SIS allotted time slots. Or we may be able to develop them into

webinars that can be offered even sooner. If you have ideas about possible webinars, feel free to contact me or the Regional Education Chair, Sara Paul. You can listen or view audio or video files of older presentations at: <http://www.aallnet.org/members/media.asp> (requires logging into the members only section of AALL).

AALL will be holding its first Leadership Academy in October. The Leadership Academy is designed for law librarians in the early stages of their careers to enable them (you?) to get ahead in the profession. PLL is pleased to announce that **Research Solutions** is underwriting a travel grant for two PLL members to attend the Leadership Academy. The grants have been awarded to Cameron Gowan and Sarah Mauldin.

Mark Your Calendar: Professional Legal Management Week, October 6-10. More information is available at: <http://www.aallnet.org/press/e-newsletter-200808.asp#14>.

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Evolve, Evolve, Evolve, *continued from page 1*

development plans, and while the research team knew of several real estate purchases, that was just a small fraction of the 40 planned stores. Finally, the CI team researched the state Alcoholic Beverage Control license applications. Bingo! Southern California Edison then knew exactly where the stores would open and the utility planned power generation adjustments accordingly.

This was presented as a real life example of creative research resulting in solid and directly relevant data. But CI practitioners would argue that this is *not* an example of CI. Mr. Morton and his team were wise to find a single source of perfect information, but they were not required to analyze or synthesize several sources of data and draw conclusions from it. In some cases, yes, there is a silver bullet that answers the business question flawlessly and completely. But in many instances, experience and analysis need to be brought to bear in a way that is not a perfect science.

AALL has had a CI caucus in place for more than two years now. Mark Gediman is the director of information systems at Best, Best & Krieger in Riverside, California and co-founder/co-leader of the caucus. Mark opened a panel presentation by saying, “marketing thinks the library can’t do this.” He cited a CI panel he attended at the LMA annual meeting as evidence. Immediately following his remarks, the first panelist listed and ranked the top six CI data sources in the typical law library:

- Bloomberg
- Capital IQ
- Lexis Nexis AdVantage
- MergerMarket
- Thompson One Banker
- West

Beyond this useful but not terribly “outside the box”

ranking, discussion was limited to the format and layout of dossiers, “marketing the CI function”, and how CI should be viewed as different and apart from traditional legal librarian work product. So while I believe there are exceptions (including at my own firm), I think this shows that while law librarians have the ability to do CI—in fact they are in many instances advantageously positioned to do this work—in most cases they remain focused on the data and shy away from any analysis. This is because as a group they are not encouraged to develop the analytical skills that are the core of CI.

Evolution.

A few thoughts on issues that AALL might consider including at next year’s annual meeting:

- Understanding the strategic priorities of the client and how these will affect buying criteria
- Anticipating the new types of legal work that may flow from these strategic priorities
- Discussion of the cultivation and use of primary sources and how to find out what’s going to happen before it appears on the front page of the *Wall Street Journal*
- Guidance on how to set up an early-warning system
- Examples of how to provide support for competitive bids and Requests for Proposals (RFP)
- Helping associates find a marketable niche based on unique research or cases on which they are working

As law firms, we are selling knowledge and expertise; we need to be on the leading edge in many subjects and in many industries. Working together, we can create a different dynamic among CI, marketing, and sales that will result in better informed and more successful firms.

PLL PROGRAM

EXPLORE: BEST PRACTICES IN THE SMALL LAW LIBRARY

reviewed by Louise A. Jensen, Drummond Woodsum, Portland, ME

Presented by the One-Person Law Library Group, Mary K. Dzurinko, moderator

As a solo librarian, I can attest to the fact that most of us crave the company of other librarians, and we value every second we have with others who are in the same boat, hoping we can answer the latest “what do or did you do about...” question. This sentiment was readily apparent among the librarians at this roundtable forum.

Several tables in the meeting room (and yes, they were round) were labeled with topics pertinent to library management such as: professional development, annual reports, OPACs, budgets, etc. After a brief introduction where “best” was briefly described as successful, easy, profitable, and of the highest degree and “practice” was defined as a performance standard where we seek to perform to perfection (seeking is the operative word here), we were asked to sit at a table with a topic that was of

interest to us. Each group had thirty minutes to discuss the topic. We had to come up with some best practices for the topic, discuss how to find resources and support, and talk about how to implement the best practices for that topic. Each group designated a presenter who then briefly summarized the findings to all of the participants of the session.

My group was very eager to not only discuss our topic, but anything else we could throw out. In fact, my only criticism of this forum is that we really needed more time to get to know each other a bit, to get focused on the topic at hand, and then later, to either discuss other issues or to expand on the topics already on the table(s). The presentations were helpful, but again, we needed more time as we are a group of librarians who are hungry for the exchange of information. I hope PLL-SIS will continue to support and encourage these types of forums at future meetings.

PLL PROGRAM

USING CONSULTANTS AND CONTRACTORS (AKA OUTTASKERS) TO TAME YOUR BUDGET

reviewed by Kathleen Kelly, Lockridge Grindal Nauen P.L.L.P., Minneapolis, MN

Using Consultants and Contractors (aka Outtaskers) to Tame Your Budget, was held Monday, July 14, 2008 at 12 p.m. The speakers were Nina Platt of Nina Platt Consulting Inc., Mary Dzurinko of MK Dzurinko Associates, Kathie Sullivan of Sullivan Information Management Services, and Joan Axelroth of Axelroth & Associates.

Nina introduced the program with the “how” and “when” of hiring a consultant/contractor. Regarding “when,” the recommendation is to be proactive and not wait for management to make the decision. Be a leader and keep control. The “how” ran through the entire program.

Kathie Sullivan talked about the positions that are most eligible for outsourcing; circulation staff, conflicts staff, cataloger, and research librarian, to name a few. Potential tasks for contractors are space planning, training the trainer, knowledge management strategy, and my personal favorite, weeding collections.

Mary Dzurinko focused on hiring a consultant – how to find a consultant, develop a proposal, select the right candidate, draft the contract, and manage and evaluate the services. She said be specific in your RFP, get references, be flexible, and most important, pay on time.

Joan Axelroth covered case studies including a

staffing study and Kathie’s experiences as a special project paralegal. She discussed peer support and sporadic staffing needs.

The panel was followed by a Q&A. Questions included, what to do about conflicts on research projects, how to convince management of the need to outsource certain tasks, and the most popular, what to charge.

Thankfully, the room was not set up in the traditional classroom style, but the tables formed a square. The panel sat at a corner with no platform or podium and no PowerPoint. The mood was relaxed and conversational, no speeches, just information sharing. This also made it easier to eat the box lunches that were served to attendees.

There was a certain amount of overlap of information between the speakers, but the presentation was well planned and each speaker was prepared. Their experience showed as did their business acumen. The handout was detailed and served as an outline of the whole session and included gems like an interview checklist.

Nina made it clear at the beginning that this would not be a sales pitch or an attempt to take anyone’s job, and they convinced me. They forgot to introduce themselves until midway through the session.

PLL PROGRAM

PATENT INFORMATION VENDOR PANEL DISCUSSION

reviewed by Kimberly Martin, Goodwin|Procter LLP, Boston, MA

The PLL-SIS and the Intellectual Property (IP) committee co-sponsored a panel of five patent vendors on Sunday evening at the AALL conference in Portland. Those in attendance included: Mike Hudleson of Lexis (Total Patent and Patent Optimizer); Ron Kaminecki of Proquest (Dialog); Bill Chambers of Thomson (Micropatent, Thomson Innovation, and Delphion); Teri Dockter of Fitz Karlsruhe and STN; and Renaud Garat of Questel. The moderator for the discussion was Paulette Toth from Kirkland & Ellis. The IP group had five questions that they felt were extremely important to the law firm industry and all panel members were asked to respond with how their company is addressing law firm concerns.

The first question addressed the cost structure of services provided to our industry and the need for more variety in payment plans that would work for law firms, such as pay-as-you-go instead of a typical yearly flat rate contract. Each vendor felt that they understood the need for a better payment plan structure for law firms and that their companies have either a good plan in place or they are working on improving their plans. Dialog and STN have addressed the need for firms to bill back their research to clients by having a pay as you go service which works best for law firms. Thomson, Lexis, and Questel all have put into place a cost recovery feature to help with the bill back to clients while retaining yearly flat rate services. In addition, Thomson also stated that they were working to improve their systems within the new Innovations products so that they can better serve the law firm industry.

The second question focused on the administrative functions of the products including billing, reports, tracking, and password creation and management. The responses from each of the panelists varied. Thomson Scientific, who manages the IP services Thomson Innovation, Delphion, and Micropatent, is still working on collaborating with West, a sister company, to use the same type of client service interface that West uses for their products. Bill Chambers (Thomson) mentioned that with the restructuring of the company into Reuters Thomson, there should be more integration of the systems. Questel offers to send reports on users to their clients and they offer either IDs for users or IP recognition. STN has electronic usage reports and they can send a list of the user IDs. Lexis stated that they have tools similar to their other products.

The next question for the panelists dealt with training and customer service enhancements. All of the vendors said that they had many different training opportunities available to end users including one-on-one sessions. They all had customer support services. Lexis, Thomson, and Dialog provide 24/7 coverage. STN provides coverage for all but the time frame of 8 p.m. – midnight EST – a bit of a disappointment as this can be a busy usage time.

The fourth question for the group concerned end user prior art searching for content other than patents. All of the vendors except Questel have some access to scientific literature for a user to search in conjunction with their patent search. The amount of content varies per service but is increasing in most cases.

Finally, the vendors were asked to address the future and if there were any new technologies coming out soon that would interest the IP user groups. Questel mentioned that they were in a partnership with Intellexia (www.intellexia.com) to offer a new product that would graphically display patent families and citations as well as offer analysis. STN is going to be offering the World Patent Index database in Anavist, a patent relationship database. The STN viewer will be able to deeply analyze patent full text documents and will offer a variety of web based tools to allow searchers to share the results with attorneys. Thomson has created Innovation, which is the best of their patent research products rolled into one. Lexis will be offering more content and Romance language patents translated in full text. In the future, they are looking toward Asian patent translations. At the time of this panel discussion, Dialog had just been purchased by Proquest so there was nothing new to mention.

Overall, the vendors' answers were not a surprise and each had a good response to the issues presented. All recognize that law firms are their own special industry and our needs are different from their corporate clients. Hopefully, what they take away from the discussion is a better understanding of what law firms are looking for in a product and what they need to work on to address our issues. The presentation was good and the IP group did a great job choosing questions that really hit on the major points important to all law firms with an IP practice.

PLL PROGRAM

THE EVOLVING ROLE OF THE LAW LIBRARIAN IN LITIGATION SUPPORT

reviewed by Kathleen M. Coon, Montgomery, McCracken, Walker & Rhoads LLP, Philadelphia, PA

At this 2008 AALL program, presenters Cindy Spohr, Senior Director, Librarians Relations Group LexisNexis and David Dilenschneider, Esq, Director of Litigation & Business Information Solutions for LexisNexis explored how private law librarians can increase their value to the firm by involvement in litigation support.

The program speakers started out by asking the attendees what size firms they worked in and what their roles were in the firm. The audience ranged from solo librarians to librarians from mega firms who were actively involved in litigation support.

Ms. Spohr pointed out that traditionally law firm roles were defined as either partner, associate, paralegal, librarian, or support staff. Today there is much more role specialization in law firms. Some of the new roles that exist in firms today are research specialists, contract attorneys, analysts, and investigators.

The evolving role of the library was shown by mentioning that in the 1990s, the library was a “stand alone” physical space only and provided information and arranged for demos and training. Today it is a service department. In the future, it may become a fully integrated part of all practice areas.

Litigation support was defined by the speakers as all the activities designed to prepare a lawyer to try a case. The support examples mentioned were:

- Legal Document Management: internal, external, and discovery “research”
- Litigation Case Management: controlling and managing cases within the litigation process
- Trial graphics: Animation Diagram used by lawyers to help explain complex technology
- External client communication
- Document preparation (cite checking, table of authorities, rule compliance, etc)
- Rule compliance including e-discovery rules

One of the speakers mentioned that a point person is needed to collect information about all of the available tools. Should the point person be a Librarian or someone who reports to a Librarian? It was also stated that departments silo themselves and the library should be the liaison because the library staff works with everyone.

Although I didn’t agree with everything that was

mentioned at this program, it did force me to identify litigation support as an area I want to explore further. Some initial questions posed for Librarians to address with their litigation department are:

- Who handles e-filing?
- What litigation support tools are my firm using?
- What works and what doesn’t?
- How do we measure success (ROI) on the tools we purchase?
- Are we using the most efficient and cost effective method to track dockets?
- How do you get people to “break work habits” and try new tools?
- What are the pain points for my litigation department?

I was interested in attending this program because of the plethora of new products for litigators that are now available on Lexis and Westlaw (as add-ons) or from one of their related companies. Many of the vendors we use are bundling new products or recent product purchases onto existing ones. This makes it hard to keep track of which one does what and who needs to be notified about these changes.

I was recently invited to attend a demonstration of a litigation tool that is being used by some attorneys at my firm. I found the demo very interesting and was surprised when the presenter mentioned a customer incentive plan which would give us a credit on other products purchased from this vendor if we exceeded a certain amount of usage for this litigation product. Whether we like it or not, we need to know what products are available, which ones our firms are using, what discounts are available, what our users like and dislike about these products, how to coordinate product demos, and how to evaluate whether or not a certain product could be beneficial to our firm.

This program raised my awareness about the importance of keeping informed about litigation support tools and how my firm is using them.

PLL PROGRAM

WHO MOVED MY PENCILS? MANAGING CHANGE IN THE TECHNICAL SERVICES DEPARTMENT

reviewed by Joan R. Englander, Bracewell & Giuliani LLP, Houston, TX

This program, presented on Tuesday, July 15, 2008, was a result of Joni Cassidy's efforts on the part of PLL-SIS's Technical Services Group. Seattle-based Crisis Counselor Renee Arcement was the guest speaker for this interactive session on "Managing Change in the Technical Services Department."

It was determined that with all the changes going on in today's law firm libraries, our stress levels are up quite a bit! The Technical Services (or whatever you call it now) staff is being inundated with new developments. We have to deal with changes ranging from the simplified K Library of Congress catalog schedule to how we are going to make our libraries adjust to complete changes in the hierarchy of the library staff.

How do we handle change? It is not always expected. It can make something different or replace it all together. Change tends to move us and everything around us into a new direction. It makes us ask ourselves, "Where are we going? What are we doing? Where will we end up?"

Renee spoke about the eight lessons on change developed by Michael Fullan in 1993.

Lesson 1. You can't mandate what matters (the more complex the change, the less you can force it).

Lesson 2. Change is a journey, not a blueprint (change is non-linear, loaded with uncertainty and excitement, and sometimes perverse).

Lesson 3. Problems are our friends (problems are inevitable and you can't learn without them).

Lesson 4. Vision and strategic planning come later (premature visions and planning blind).

Lesson 5. Individualism and collectivism must have equal power (there are no one-sided solutions to isolation and group think).

Lesson 6. Neither centralization nor decentralization work (both top-down and bottom-up strategies are necessary).

Lesson 7. Connection with the wider environment is critical for success (the best organizations learn externally as well as internally).

Lesson 8. Every person is a change agent (change is too important to leave to experts; personal mind-set and mastery is the ultimate protection).

Everyone should feel validated and like they are part of the change process. These lessons reinforce the values of change which should be continually woven through the organization with which each of us is involved.

After Renee told us about change, she had us experience it. The members of the group each participated in one of four different exercises.

Exercise 1. Two teams of three persons were formed. The two people holding the rope were facing each other and the third person jumped. This was relatively easy for those who are even slightly coordinated. Then the change came! The two people holding the rope were asked to turn around with their backs to each other and change to their non-dominant hand. This was much more difficult. Their mind and their bodies had to adjust to the change in routine.

Exercise 2. This time there were two teams of two persons each. One person was asked to tie a jump rope in a bow around the other person's arm. Again this was very easy for everyone old enough to tie their shoes. However, the next part of this exercise involved tying the rope one handed. This was as hard for the person having the rope tied as it was for the one tying. Imagine the frustration of sitting and watching the other person struggling to work the rope into a bow and not being able to help!

Exercise 3. This exercise was given to three groups of two persons each. They had to toss small rubber balls to each other. For some of us, it is hard enough to throw to a target and not miss or to catch the ball as it is coming towards us. Think about how much harder it was to try throwing with your non-dominant hand as the participants did in the second part of the exercise. The third part of the exercise involved the participants changing sides and throwing.

Exercise 4. The last exercise involved a relay race with two teams of two trying to use a small plastic spoon to scoop mints off a plate and get them as quickly as possible into a bowl across the room. They had to do this with their non-dominant hand and get it done within three minutes. The team with the most mints in the bowl would be the winners. In the middle of the game, the time was changed to 2½ minutes and then to two minutes.

The purpose of these exercises was to show us how we can deal with different types of change, how change can cause stress, and what we can do to overcome the stress. Some of the things mentioned were planning, visualizing what the end result should be and how to achieve it, and the need to work with your mind and body to accomplish tasks in the midst of change.

We all handle change in different ways. Some find relief in music or a bubble bath at the end of the day. Others take it out on our family members or pets. The idea is to work through the stress of change in a positive way.

Stress is a chemical reaction that can even affect our short term memory. We need to remember that stress is

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PLL PROGRAM

ENERGIZE YOUR PRESENTATIONS OR “MORE POWER TO YOU”

reviewed by Lauri Flynn, Gunderson Dettmer, LLP, Menlo Park, CA

The program should have been titled “Pitfalls When Doing a Presentation.” This was one of the 30 minute sessions and it was very funny, but not quite what I had hoped. Cindy Carlson introduced Mark Schwatz, a Westlaw trainer from the New York area. Some people knew him and knew he was a good presenter. He stood up, dropped his notes, told a bad joke, mumbled something about the program contents, started the slide show with the wrong slides, turned his back to the audience, etc. In short, he did everything wrong. After we figured out he was doing this on purpose, we had a good laugh each time he made a mistake. The program then turned to talking about

what he had done wrong and conversely, what one needs to do to engage the audience. The main message was that presenting is an adventure and interaction with the audience is most important. Marie Wallace’s Guide(s) on the Side, in issues of www.llrx.com, were mentioned as a valuable resource. I agree and have consulted them before giving presentations. There was a good handout of best practices when giving a speech. I think a good follow-up program would be the next step, i.e. how to not only connect with your audience but how to “wow” them, demonstrating techniques that make a presentation stand out.

Who Moved My Pencils?, *continued from page 8*

the way our mind and body reacts to the challenges and threats caused by stress. We need stress to survive. Also, all stress is not bad. It brings out our creativity and adrenaline to get the job done when needed. The bad stress is when ordinary stress becomes distress, too much stress. That is when we lose control of the situation and we get ourselves into situations which make our lives harder.

The signs and symptoms of stress are tension, worry, and frustration. We are sad and withdrawn. Our work performance suffers because of the depression. We become disillusioned and angry and this results in extreme behavior such as acting out.

The best ways to manage stress are to avoid drugs including tobacco, decrease negative self-talk, eliminate excessive caffeine intake, exercise and eat regularly, build our network of friends, learn to feel good about doing a competent job instead of expecting perfection from ourselves, learn relaxation skills, and learn practical coping skills.

For others, we can watch and listen to them to make sure they are not overloading themselves. We can avoid comments that minimize their problems. They will not

think the problems are unimportant! We can offer reassurance, help, and support and be a model for effective coping skills. We can encourage others to use their decision making skills and to create their own solutions to their problems.

Problem solving, managing emotions, and tolerating stress are all essential coping tools. They help to change the situation or get rid of the problem. These skills can help us identify and handle our thoughts and feelings caused by the problem. They can also help us by creating distracting or self-soothing behaviors that help us to tolerate the situation.

A strong resistance to change is deeply rooted to our conditioning or historically reinforced feelings. These need to be broken into small pieces that can be resolved. Be mindful of your strengths and weaknesses and express your desire to be a change agent.

This program was extremely helpful as have been the other programs presented in San Antonio and New Orleans for AALL by Renee Arcement. She gets to the problems we face as librarians and as human beings, puts a face on them, and shows us how to work through them.

AALL/WOLTERS KLUWER LAW & BUSINESS GRANTS PROGRAM

The AALL Research & Publications Committee is accepting applications through Monday, November 3, 2008, for research grants from the AALL/Wolters Kluwer Law & Business Grants Program, totaling up to \$5,000.

The committee will award one or more grants to library professionals who wish to conduct research that supports the research/scholarly agenda of the profession of librarianship. The grants program funds small or large research projects that create, disseminate, or otherwise use legal and law-related information as its focus. Projects may range from the historical (indexes, legislative histories, bibliographies, biographies, or directories) to the theoretical (trends in cataloging, publishing, or new service models in libraries) to the practical (implementation models for collection, personnel, or infrastructure management).

The AALL Research Agenda offers suggestions for possible research projects that cover a wide segment of professional interest, including the profession of law librarianship, law library patrons, law library services, legal research and bibliography, legal information resources, and law library facilities. However, projects are not limited to those described in the agenda, and the committee will consider all applications and research projects. To review AALL's Research Agenda, please visit www.aallnet.org/committee/research/agenda.asp.

The AALL/Wolters Kluwer Law & Business Grant Program was first established in 1996 with a generous contribution of \$50,000. Wolters Kluwer Law & Business considers its contribution as an investment in research that will provide a prospective look at the role of librarians, researchers, and legal information providers and will yield results to which publishers can respond. The goal is to sponsor research that will have a practical impact on the law library profession and inspire products and changes in the marketplace.

To apply for the grants, all applicants must provide

resumes and statements of their qualifications for carrying out their projects. The applications must demonstrate experience with research projects and an understanding of the dissemination and use of legal and law-related information. Priority will be given to individual AALL members or AALL members working in partnership with other information professionals. The grant application and complete guidelines are available at:

www.aallnet.org/about/wklb_grant_application.asp.

The submission deadline for applications is Monday, November 3, 2008. Grants will be awarded and announced in January 2009. Allocation of the research grants will be at the sole discretion of the AALL Research & Publications Committee.

For more information about the grants, please contact Annmarie Zell, chair of the AALL Research & Publications Committee, at annmarie.zell@nyu.edu.

The members of the AALL Research & Publications Committee are:

Annmarie Zell, Chair, NYU Law School Library
 Pamela Melton, Vice Chair, University of South Carolina, Coleman Karesh Law Library
 Daniel Campbell, U.S. Court of International Trade Library
 Jacqueline Cantwell, Brooklyn Supreme Court Library
 Annemarie Donovan, Willkie Farr & Gallagher LLP
 Debora Person, University of Wyoming, George W. Hopper Law Library
 Adeen Postar, American University, Washington College of Law, Pence Law Library
 Margaret Schilt, University of Chicago D'Angelo Law Library
 Paula Seeger, University of Minnesota Law Library
 Maryruth Storer, Orange County Public Law Library
 Sharon Wang, Osgoode Law School Library, York University

W-4

SO NOW YOU'RE CONFLICTS?/SO NOW YOU'RE DOCKET?: THE EVOLVING LAW FIRM LIBRARY MANAGER

reviewed by Patricia Barbone, Hughes Hubbard & Reed LLP, New York, NY

For some, if not all, it's no surprise that the role of law librarians, in what is commonly referred to as "BigLaw," has been evolving. Frequently librarians are partnering with other departments, and often have advisory roles. Increasingly, we are being asked to run an entire department in addition to the library. Conflicts, Dockets, and Records are some of the departments most frequently being managed by the Library Director. This growing trend provided the genesis for the PLL workshop "So Now You're Conflicts, So Now You're Docket" held at this year's annual meeting of the American Association of Law Librarians in Portland, Oregon.

This workshop was the brainchild of co-coordinators Sarah Mauldin and Lee Nemchek. The intended audience of the program was librarians who are currently responsible for or believed they might soon become responsible for either the Conflicts or Docketing functions at their firms. The audience included many librarians who already had responsibility for those departments. Also attending were docketing specialists who were not librarians. I attended as a library department manager who works closely with both the Dockets and Conflicts departments. Like others, I am always trying to learn as much as possible about how other departments in my firm operate so I can better serve their needs. The program ran from noon to five, with the first half devoted to Conflicts and the second half to Dockets.

Gitelle Seer, an experienced library director from Dewey LeBoeuf LLP, covered the Conflicts segment of the workshop. Elaine Screechfield, Manager of Dockets for the Morrison & Foerster LLP, presented the information on Dockets. Both speakers recognized that the management of either a conflicts or dockets department may be thrust upon the librarian, but it may also be something a librarian actively seeks to further their career opportunities in the firm.

Seer spoke candidly about how she got involved in managing the conflicts process at her firm when it was known as Dewey Ballantine. While she no longer manages conflicts in her current position at Dewey LeBoeuf, she has many years of conflicts experience to share. Initially, her relationship with the Conflicts department began when she was asked to advise on the selection of a conflict research tool; after a time in an advisory capacity, the Firm asked her to manage the process.

Seer stated that while the conflicts process had many ties with traditional library work, there were still many new things to learn. Librarians leading the conflicts process need to have a greater understanding of the business intake and client assignment process. They need to understand the application of engagement and waiver

letters. They need to familiarize themselves with ethics and conflicts rules at both the national and local levels. They need to understand these processes and rules in order to make practical decisions. There are a lot of unwritten rules and codes of behaviors in every law firm. Some firms don't take cases in certain industries. For example, a firm that does patent work for the pharmaceutical industry and also has a general corporate litigation practice may choose not to sue pharmaceutical companies even if it is a matter unrelated to drug patents. Even defining what is a client and what is a former client is not always straightforward when determining conflicts. No one wants to turn down work, but no one wants to open the firm to problems down the road. As Seer stated, "A lot is riding on us getting it right."

Finally, Seer assured the audience that the qualities that make good librarians are also the qualities that make good conflicts or business intake analysts. These positions all require strong searching skills plus the ability to identify, analyze, and resolve problems.

Seer's overall impression of her time managing the Conflicts process was positive, and she encouraged other librarians to view it as a career opportunity.

Elaine Screechfield continued the workshop with a discussion on Dockets. Screechfield has spent her entire career at Morrison & Foerster LLP, advancing from paralegal to Manager of Dockets. Screechfield was very knowledgeable about many important issues relevant to Docket Managers. She discussed the application of various court rules in various jurisdictions for filing court papers, and told the audience that it was often necessary for docket clerks to read and understand court rules to decide when a filing needs to be made. She spoke with familiarity about current software for calendaring, electronic docketing, and e-filing. She understood the complexities and vagaries of organizing workflow in large multi-office environments, and also discussed training as it relates to both docket clerks and other non-lawyer staff.

Between Screechfield's comments and the questions and comments of the audience, it was apparent that firms handle the docketing function in many different ways. Some firms organize it by the office, some calendar regionally, and some do it firm-wide. Some firms allow secretaries and paralegals to update docket information, and some leave that to docket clerks only. Docket departments may also track rule changes, e-file, or maintain a database of state bar admissions. According to Screechfield, different practice areas dictate different docketing procedures; for example, an intellectual

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E-3

THE EVOLVING ROLE OF THE SOLO LIBRARIAN: HOW TO DO IT ALL WITHOUT LOSING YOUR MIND

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

Solo librarians face the particular challenge of being asked to “do it all.” This program, presented by Lauri Flynn of Gunderson Dettmer, LLP, and Julia Hughes of Barley Snyder, LLC, described ways to successfully handle the myriad duties of a solo.

Prior to the session, the presenters sent a survey for solo librarians and received 185 responses. This gave them a basis for the content of their presentation.

Ms. Hughes explained that she is one of only two law librarians within 1½ hours of her work location. She discussed ways to fill the void created by the lack of coworkers. Professional reading is very important. She regularly reads *Spectrum*, ABA’s *Law Practice Today*, *Law Library Journal*, *Perspectives*, and the *Special Libraries Association’s Information Outlook* in print, and reviews several online sites, including LLRX, beSpacific, The Virtual Chase (sadly, a service that is being discontinued), listservs, and chapter newsletters. She encouraged the use of RSS feeds as a quick way to receive and review news.

Time is at a premium for all law librarians and solos are no exception. It is challenging to juggle research, clerical duties, managerial, and marketing tasks with little

or no library staff to provide assistance or backup. Good organizational skills are crucial. One way to “work smart” is to break up each task into smaller portions that can be delegated or done in smaller chunks of time. Make sure you receive reasonable deadlines. Set realistic expectations for yourself. Learn to prioritize your workload. As much as possible, prepare in advance for your absences.

Solos need to be proactive in creating networking opportunities, such as joining the One Person Library listserv.

Ms. Flynn discussed the benefits of being a solo librarian. One of the biggest benefits, according to the pre-program survey, is the independence and autonomy enjoyed by solos. She stated that solos first and foremost need to become experts at time management and have a passion for their jobs.

This program was well attended and well presented. The suggestions offered were very beneficial for solos and would also be helpful to non-solos.

The program was innovative in that it was also presented as a live Webinar.

So Now You’re Conflicts, *continued from page 11*

property (IP) practice requires more docket support.

It was interesting to learn that the calendaring process, and the necessity for dual or sometimes triple calendaring is driven, not by any court rule, but by the malpractice insurance carriers. There are no attorney rules that mandate a particular method of calendaring, but if a court deadline is missed, sanctions could be imposed. Each attorney is responsible for his or her own calendar.

Like Seer, Screechfield believes a lot of the qualities that make good librarians make good docket clerks. She emphasized attention to detail, problem solving, the ability to read and apply rules, and research skills as necessary qualities. Also necessary is the ability to communicate

with attorneys and work well under pressure.

Screechfield provided an interesting and informed look at some of the most important processes and issues involved in managing a Dockets Department.

This workshop provided a detailed overview of two law firm departments which frequently intersect with the library. The program clearly fulfilled its objective in educating and enabling private law librarians to better understand the conflicts and dockets process, and to help librarians evolve into potential advisors, collaborators, or managers.

A-3

EDUCATING THE C-PEOPLE: ENGAGE YOUR DECISION MAKERS AND HELP THEM EVOLVE

reviewed by Michele Lucero, Thomson Reuters, Los Angeles, CA

Coordinator and Speaker: Monice M. Kaczorowski, Neal, Gerber & Eisenberg LLP

Moderator: Gayle Lynn-Nelson, LexisNexis

Speaker: Cheryl Niemeier, Bose McKinney & Evans LLP

Speaker: Deborah S. Panella, Cravath, Swaine & Moore LLP

Speaker: Holly Pinto, Holland & Hart LLP

This program focused on tips, techniques, and suggestions to understand, educate, communicate, and negotiate with the C folks in your firm. It is important for librarians to prove their worth in their organization by leveraging their assets and expertise. Several questions were proposed to the panel of experts. Each gave their own insight as to what they have done to address the question in their firm. The C levels are anyone within your organization with a C level title (i.e., CEO, CFO, COO, and CMO). Below are a summary of responses to the questions proposed to the panel.

If you are not currently a C-person, how can you become one and have the courage, control, and expertise to be in a peer-to-peer relationship with other C-people in your organization?

Monice recommended starting small and identifying the correct C person that you need to speak with based on what you are trying to achieve. If you are interested in cost recovery, you would probably want to speak with the CFO. You want to align with the C level that holds the power. Secondly, Monice suggested educating the C persons. We need to communicate to them and be proactive. We need to understand their role and how it can impact your library.

What C person in your organization has been successful and how can you emulate what they have done?

Debbie said that all C persons have something to offer. For example, the CIO at Cravath has high energy, is a good speaker, motivational, a good listener, and holds to his promises. The CMO has helped figure out how to share and is concerned with the firm going forward. Monice mentioned that the CFO at her prior firm reassessed billables and cost recovery. He made Monice part of the process with the billing, revenues, cost of new associates, and real estate space. Most important, Monice learned that if she could justify staff, she could get additional personnel. Cheryl mentioned that her COO was a supporter; the glue that holds the firm together. In summary, the success has been through extraordinary leaders seeing the big picture and moving quickly with decisions. Having trust, respect, and communicating with employees has led to victory.

Have you considered the C person's perspective? How does a C person think?

Holly considered that this must be a difficult position. The C person probably doesn't think much about the library; rather it is important to speak the C person's language (cost benefit analysis and economical impact). It is beneficial to know where they are coming from in order to know how to proceed if you need something for the library. Monice suggested looking at the big picture. Look at what are they reading, set up alerts, and have your elevator conversations ready. The C people are intrigued when you show interest in them. This is also another way to market the library.

What or who are the biggest obstacles or roadblocks you have faced in being successful? If you have conquered them, how have you done it?

For Cheryl, the biggest obstacle has been additional staff for the library. They have been successful thus far with four interns, but not yet with adding a full time additional staff person. You have to be unafraid to ask for what you need, communicate clearly with the C person, take risks, and be creative in obtaining what you need. Debbie mentioned her biggest roadblocks have been getting past the stereotype of the librarian and the burden of daily responsibilities. Librarians need to look at life from the C level's perspective and anticipate their questions. We need to make a commitment to go beyond the day-to-day activities and have a strategy in place.

Who has helped you along the way, inside and outside your organization? Who has served as a mentor? What outside organizations, memberships, education courses have helped you?

For Holly, she was promoted without managerial experience. She sought out internal colleagues who proved invaluable when it came to working on the budget. She also developed relationships with external colleagues that helped with her growth as a professional librarian. Professional associations and activities such as AALL, West Advisory Board, and AMPLL provide for networking and participation with other colleagues. Cheryl said that other firm librarians and those she met through local library associations helped her. Debbie also suggested joining and becoming active with other organizations such as ILTA. In summary, it is important to network and get involved at all association levels, be a mentor for others, and take advantage of vendor activities. We need to get out of our comfort zones and participate with other associations as well.

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I-3

NUTS AND BOLTS OF CI – DELIVERABLES

reviewed by Riva Laughlin, Haynes & Boone, LLP, Houston, TX

Frank Lee, Paul Morton, J.O. Wallace, Jr., and Cindy Shamel discussed what to do with CI information once you've gathered it. A little of this information was repeated from the earlier CI program, but it was worth hearing twice.

- From Cindy Shamel (Shamel Information Services)
 - Deliver answers – Don't just provide a data dump.
 - Organize the information – MS Word can create a TOC. Use article titles as sub-headings.
 - Summarize – No one wants to read everything. Create a summary sheet with the high points listed.
 - Visualize – Use charts, tables, and graphs where possible.
 - Standardize – Brand **everything** that comes from the library.
- From Paul Morton (Southern California Edison)
 - Business decisions are based on

information gathered and analyzed – not on instinct.

- Know who the ultimate customer is.
 - Ask how, when, and why the report is needed.
- From J. O. Wallace, Jr. and Frank Lee (Latham & Watkins)
 - Create a template/checklist for each request.
 - Include information on other work done by the firm and who knows whom.
 - Include a conflicts report.

Librarians, as a profession, are good at gathering information. Many of us are not as good at presenting that information in an organized format. This program pointed out some of the ways information can, and should, be presented. I was especially taken by the idea of including information from within the firm. This is something that should be automatic, but is frequently overlooked.

Educating the C-People, *continued from page 13*

What mistakes have you made along the way and how have you corrected them?

Debbie pointed out that librarians often undervalue themselves and their services. Sometimes we underbill our time and we do not fight for correct billing rates. We should all keep a private journal of our successes and not promise too much. We need to also manage our time and priorities.

What are the topics you should discuss with the C People in your organization?

Cheryl recommended staying on top of what the C people are reading. Place your name on the routing list, read it first, then route it. This way you will stay informed and be able to discuss these topics with the C people. We need to be proactive and bring problems as potential solutions to the C level. Holly suggested alerting the C people early, so there aren't any surprises. For example, alert them of price increases and cost recovery concerns. Attend vendor events where C people often attend and visit your regional offices for exposure. In summary, you want to speak their language and do your research to learn what the C people want.

Is the C Level in your organization where you want to be? Now that you are there, what price do you pay? Will there be increased stress, increased hours, increased demands and expectations?

The C level is not a decision to be taken lightly. Monice suggests thinking about if this is a career direction you want

to take. It will involve more responsibilities and you will still need to run the library. It is a whole different ballgame and you will be expected to work longer hours. It is a position that will influence your current lifestyle.

How have you shown your successes to the C people in your organization and why is it important?

Cheryl said don't be afraid to speak up. While downsizing their library, she donated books to a new magnet school and was featured in the newspaper for this great offer. The firm was notified and she was given recognition across the firm. Often the librarians that are silent are the ones that really get what they want. Holly said it is important to inform the C people of your successes because otherwise they may not know what an asset you are to the success of the firm.

In summary, this program was extremely useful because it offered real-life suggestions on how to develop a relationship with the C people to help the library and firm succeed together. Educating the C people involves helping both yourself and them evolve. Sometimes we are afraid to ask for what we need, do not market ourselves and the library enough, or simply don't have the time to interact with the C level. It is critical to develop relationships with the C people because they make the decisions for your firm and influence your library.

H-5

PATENT SEARCHING DEMYSTIFIED

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

“Patent Searching Demystified” was a ninety minute session presented by five experts in intellectual property research. Kathy Skinner, Morrison & Foerster LLP, moderated the session. Presenters were: Kim Martin, Goodwin & Proctor LLP, Rebecca Olson, Alston & Bird LLP, Eric Montes, Townsend & Townsend & Crew LLP, Richard Matula, Kenyon & Kenyon LLP, and Jeff Bois, Fish & Richardson PC.

Five topics were discussed at length: patent family and legal status, foreign patents and abstracts, assignment searching, searching for litigation relating to a specific patent, and prior art searching.

Kim Martin discussed patent family research. She described types of search requests and methods and defined the term “patent family” and related terms. She discussed Derwent, Dialog, World Patent Index (WPI), and INPADOC as being among the important patent searching resources.

Rebecca Olson discussed how to search foreign patents. Ordering patents that are originally in a foreign language can be a difficult task. She discussed options for translation of foreign patents and other issues unique to foreign patents.

Eric Montes discussed patent assignment searching. Patent assignment searching revolves around the two

questions “To whom is patent X assigned?” and “What patents are assigned to company X?” Sources, methods, and the difficulties involved in answering these questions were explained.

Richard Matula spoke on the topic of searching for patent litigation. He explained that there are three basic sources and two different methodologies for identifying U.S. District Courts patent litigations when you know the patent number. All three must be used and additional research can be needed for your research to be considered comprehensive.

Jeff Bois presented the last section, on prior art searching. He first explained, in an amusing but instructive way, the definition of prior art and how it pertains to patents. He discussed types of searches, sources for prior art, free and web based subscription databases for prior art searches, issues encountered when searching for prior art, and the search process.

All of the speakers at this program were clearly very expert searchers who had spent a lot of time preparing this session. The presentation was accompanied by copious and useful handouts, which are posted on the IP Group’s website at

<http://www.aallnet.org/sis/pllis/Groups/ip.asp>.

C-2

STRATEGIC PLANS THAT WORK: CREATING A STRATEGIC PLAN FOR A LAW LIBRARY

reviewed by Stefanie Frame, Foley & Lardner LLP, Los Angeles, CA

Presented by:

Julia Hughes, *Barley Snyder LLC*

Mindy Maddrey, *formerly of Sonnenschein Nath & Rosenthal, now a part-time consultant*

This session targeted attendees wanting to learn how to formulate a strategic plan. Five areas were covered: the value of a strategic plan, steps in creating a strategic plan, elements of a classic plan, challenges in structuring a plan, and follow-up steps. Mindy Maddrey's presentation was recorded because at the last minute she was unable to attend the conference. Despite this, there was very little disruption to the flow of the presentation, as both speakers took turns presenting the material.

A strategic plan is valuable because it facilitates communication among library administration, firm management, and library staff. Current status and future potential can be defined and demonstrated using business language. The plan affirms current values for library staff by identifying and analyzing success stories and presenting future potential. Therefore, a plan provides a roadmap to go forward "with intent, rather than by accident."

Conducting an external and internal audit is the first step. The external audit focuses on the community (or patron base): demographics, types of practice, culture, geography, the organization's overall strategic plan, your own impressions about your community, and how the library is perceived by the community. The internal audit

consists of defining the library's role and purpose within the firm, the firm's organizational structure, library personnel, physical environment, technical environment, core competencies, and projects.

The six elements of a classic plan were defined, and strategies provided for creating each part. A classic plan contains an executive summary, a mission statement, a vision statement, a statement about organizational issues and strategies, objectives/goals/actions, and a timeline.

The three major challenges to creating a strategic plan are time investment, political capital, and the possibility of revealing problems in functioning. Possible solutions for each challenge were presented. For example, one solution is to involve staff in the process, thereby sharing the time burden. Presenting the plan in person in order to explain any problems in functioning will help with that challenge.

Lastly, there are follow-up, or post-plan, steps. Once the plan is completed, it must be approved by management. This can result in revision and resubmission. Once the plan is approved, there are status reports and further revisions as things may change.

Ms. Hughes and Ms. Maddrey created a wiki for this presentation, which can be found at <http://c2strategicplans.pbwiki.com>. The wiki contains presentation slides and other materials.

BUSINESS MEETING MINUTES

July 13, 2008

by Karen Silber, PLL Secretary, BNA, Rockville, MD

The meeting was called to order at 7:35 a.m. by Chair Lucy Curci-Gonzalez. A motion to approve the 2007 minutes with no changes was made and approved. A move to “destroy” the electronic election ballots was approved.

Lucy thanked LexisNexis for breakfast and West for lunch. Lucy then thanked Thompson Scientific & Questel Orbit, BNA, and Softlink for their contributions to other events and also Wolters-Kluwer & Quidlibet Research, Inc. for funding the travel grants.

Two PLL-SIS VIPs were introduced, Rachel Loper and Kevin McMurdo.

The Travel Grant recipients, Hope Porter, Louise Jensen, Byron Hill, Leann Genovese, and Sara Paul, were asked to stand and be recognized. Lucy acknowledged and thanked the work of the Travel Grants Committee.

The new PLL-SIS Board members were introduced: Linda Will – VP/Chair Elect (absent), Karen Silber – Secretary, Jennifer Stephens – Board member. The outgoing Board Members were recognized and received gifts: Christine Graesser, Lynn Conner Merring, Alanna Dalton White, and Byron Hill.

The Mentees and Mentors were introduced: Natalie Davis and Victoria Kahn and Maureen Rossi and Elaine Knecht.

Certificates of Merit were made for the contributions of each volunteer and available on the table upon exiting the Business Meeting.

Groups, Committees, and Representatives’ Reports:

Treasurer’s Report: Susan Skyzinski presented the Treasurer’s Report dated April 1, 2007 through March 31, 2008. Ending Balance, as of March 31, 2008, is \$57,215.07. This figure does not include expenses for the Portland meeting.

Technical Services Report: Joni Cassidy reported on the Local Systems Meetings. The 2008 Annual Meeting will offer seven new local systems Law Users Roundtables aimed at PLL-SIS members. Joni also reported on the upcoming program “Managing Change in the Technical Services Department?”/”Who Moved My Pencils?” to be held Tuesday, July 15. Joni mentioned that there were two articles published in the 'Smaller Law Libraries' column of TSLI this year. Technical Services needs a new Chairperson.

Records and Conflicts: Lee Nemchek gave the report from August 2007 – July 2008. Lee reported that she is continuing the duties of speaking engagements, conference preparation, and current awareness. Lee reported that the Workshop held on Saturday was a success and that they had a full room. Lee will continue outreach efforts to the

L.A. Chapter of the Association of Legal Administrators. She is presenting a Poster Session on strategic planning for records management programs at ARMA, Oct. 20-23, 2008. Other work includes administering the listserv. The Records & Conflicts Annual Business Meeting is Tuesday, July 15th.

One-Person Library: Janice Leichter reported on the two presentations scheduled at AALL. The OPL would like to see more programs offered at AALL. Julia Hughes is taking over as chair of the One-Person Library.

Intellectual Property: Fran Sheehan, Chair, Paulette Toth, Co-Chair. IP had a busy year. They reported on the goals which are to address the needs of the diverse members by continuing social networking events, expand content on the PLL website, contribute to Perspectives, and to offer programs at AALL – they have two this year. The Business Meeting is on Monday. They thanked the vendors - Questel Orbit for sponsoring the business meeting and Thomson Reuters for sponsoring the Patent Information Vendor Panel reception. Fran reported that they have seen an incredible growth over the past three years which is why they continue to build programs and resources. The 2008-09 Chair is Paulette Toth and the Co-Chair is Kathy Skinner.

Competitive Intelligence: Mark Gediman is the Chair, Jan Rivers and Greg Lambert are the Co-Chairs. Mark reported that there are 356 on the listserv. CI has two programs at AALL this year. Jan Rivers is the Legal Market Association liaison. Mark reported that the CI members presented in various activities. The CI Business Meeting is Tuesday morning.

Independents: Nina Platt reported on the accomplishments of the group including the creation of the listserv. Nina would like input on the Consultant Directory. The Independents have a program scheduled for Monday at noon.

Corporate: Johanna Bizub reported that the Corporate Group is busy trying to get more active and increase membership. They have a round table today to share best practices. They are hoping to get a program for the 2009 AALL Meeting to be held in D.C. Lucy interjected and reminded members to ask the PLL Board for assistance with the programs.

Bylaws: Johanna Bizub reported that the Bylaws have not had a change in a number of years and so the

Continued on page 18

Business Meeting Minutes, *continued from page 17*

committee will do a review this year. If anyone would like to join the committee, please contact Johanna Bizub.

Strategic Directions: Martha Goldman reported that there is a change in the current format of the strategic plans to adapt more to the AALL objectives. They want to keep the same core purpose and adopt the new goals: leadership, education, and advocacy.

Public Relations: Holly Riccio reported on the PR projects including the revision of the brochure which focuses on recruiting new members. New promo items are available at the PLL booth in the Exhibit area including pens and hand sanitizers.

CONNELL: Sara Paul reported that not many firm librarians attended CONELL. She will send out e-mails to people who stopped by.

Nominations: Joan Axelroth thanked the committee for their work on the nominations for two elections. The first was to fill the vice-chair and the other was the general election. Joan will redraft the description of the nominations committee. Lynn Merring encouraged members to vote and stressed the importance and ease of voting.

Newsletter: Sarah Mauldin reported that PLL Perspectives had four great issues and encouraged people to write for Perspectives. Sarah is working on getting out the newsletter in a timely fashion. She reported on two new columns – the advice column and the book reviews column. The Newsletter meeting is immediately after today's breakfast.

Grants: Anna Cole gave the report, prepared by Jane Baugh, who could not attend. Anna thanked the vendors - Wolters Kluwer, Jones McClure, and Quidlibet Research for the travel grant funding. Anna would like to extend the grants to the Leadership Academy. There were thirteen applicants for five slots.

Mentor: Stephanie Fox is the chair and was not present to give the report. Lucy Curci-Gonzalez encouraged mentors

for those new PLL members.

Educational, Regional: Lucy Curci-Gonzalez reported that the committee received two grants for webinars on cost recovery with an attendance of 200 each. She would like to put forward more proposals including one for budgeting and is looking for more suggestions. Sara Paul is the incoming chair.

Education: Jennifer Berman reported that of the 19 proposals submitted by the Education Committee, 7 proposals for programs and one workshop proposal were accepted by the Annual Meeting Program Committee. Of the proposals that were not accepted, the Committee chose 6 for PLL to sponsor as unofficial. Their meeting is Monday at 7:00 a.m.

Webpage Revision: Byron Hill thanked the committee members for work on the website. He invited PLL members to review the proposed website design, paper copies on each table, and suggest changes. Byron may be reached by e-mail at bhill@bowditch.com, or by direct telephone at 508-926-3331.

SLA/ALA/LMS Representatives

AALL provides funding for its representatives to attend SLA/ALA/LMS meetings.

After the committee reports, we had a moment of silence In Memoriam.

New Business

Lucy Curci-Gonzalez thanked PLL and passed the baton to incoming Chair Tina Dumas.

Announcements

Jennifer Berman has signs for nonofficial PLL programs. PLL thanked Lucy for the past year's work. Meeting was adjourned at 8:47 a.m.

EXECUTIVE BOARD MEETING MINUTES

July 13, 2008

by Karen Silber, PLL Secretary, BNA, Rockville, MD

PLL Chair Tina Dumas called the meeting to order at 5:35 p.m.

Old Business and reports:

Bylaws – The committee had two members with overlapping years. It actually ended up with three members.

Web Committee – Byron Hill will stay on the webmaster committee.

Treasurer's Report – Susan Skyzinski reported that it takes AALL a long time to release financial data to the committees. Paula Davidson, the new AALL Controller, said the figures as of June 30, 2008 will be released soon. AALL is aware of the financial deficiencies and is on the third controller in three years. Trying to make programming decisions by August is difficult when the true financial picture of the section is unknown.

Strategic Directions – Martha Goldman is working to bring PLL strategic direction in line with AALL directions. The SD group adopted some AALL items and tweaked others to fit the private community. Tina Dumas asked for the older version for history. Martha still has versions of the document for comparison. Tina said the document looks great and as a working document, there is no need to approve. The new SD document will be posted on the PLL website. Please send comments to mgoldman@jonesday.com.

March Board Meeting minutes – The minutes were unavailable for approval. There will be a conference call in September for the new board – date to be determined.

Ad hoc committee to submit advertising proposal – Tina Dumas, Lucy Curci-Gonzalez, and Chris Graesser. There was criticism of the salary survey as it was not seen as a real survey. We should advertise the AALL salary survey to the “C” people. In January/February, PLL submitted a proposal to the AALL Board to advertise the salary survey. The AALL Board liked the idea but bounced it back as it was not inclusive of all SISs. We need additional plan for advertising the salary survey. An example is the ALA or SLA's advertisement in the Wall Street Journal “Your Information Partner” as seen in June 2008. Lucy needs help crafting the re-draft and asked the Board if we should pursue. Board said yes. Lucy, Chris, and Catherine Lemann are supportive of this. Web and PR Committees will help. Need the re-draft for the AALL Executive Board October meeting.

PLL Listserv – Tina will send welcome message to current board members. Those lists or listserves that do not have much activity or have not been used in several years, e.g. Knowledge Management Group and multi-location libraries, may be deleted. We are waiting to hear from Charles Reese at AALL to upgrade software.

Joint project with Academic SIS – Lucy reported that there is a common interest in teaching first year students. Michelle Wu needs a statement from PLL stating that law firm librarians are not happy with associates' current research training.

Collection Development Standards – Merle Slyhoff would like to collect Collection Development Policies from all types of libraries. There is a commonality of interest as academics look to private law firm librarians because “we're in the trenches”.

Lexis project – Lucy reported that \$15,000 donated by Lexis for the publications project is not spent. Cindy Spohr is open to using the money for a survey co-branded by Lexis and PLL but administered by an outsourced company. Cindy is also open to other suggestions. The Executive Board needs to have a conference call and bring Cindy in to flush this out.

New Business:

Liaisons – Board members serve as liaisons to keep committees and groups up to date. Tina will get a list and draft assignments to board members. If you want a particular committee, let Tina know.

Travel Grant for Leadership Academy – Thirty-five people will meet for a day and a half in Chicago in October. Lucy supports the idea to give one grant. The registration amount is \$150 and does not cover airfare. The amount needed is the registration fee for one person plus airfare. Discussion ensued on where to get the money; it was decided to get from a PLL account. It was suggested not to announce the amount, rather that it is a grant to cover travel expenses. Being a recipient of this grant requires the person to mentor for a year. The travel grant passed as proposed.

CONNELL Grant – A separate grant is needed to cover the \$100 CONELL fee and extra hotel days. Passed.

Nominations Committee

Joan Axelroth
Greg Lambert

Continued on page 20

PLL RECORDS/CONFLICTS MANAGEMENT GROUP BUSINESS MEETING

July 15, 2008

by Lee Nemchek, Oaktree Capital Management, L.P., Los Angeles, CA

Meeting Agenda:

Introductions/Attendance List
Annual Report 2007/2008
2008 AALL Workshop (W4) Report
Upcoming Programming of Interest
Program Planning for 2009 Conferences
Networking/Discussion Items
Adjournment

In Attendance:

Chair, Lee R. Nemchek, Oaktree Capital Management, L.P.
Bob Oaks, Latham & Watkins
Sarah Mauldin, Chamberlain, Hrdlicka, White, Williams & Martin
Tracy Brost, Nossaman Guthner Knox & Elliott
Lynn Merring, Stradling, Yocca, Carlson & Rauth
Carol Bannen, Reinhart, Boerner, Van Deuren
Pat Strebeck, Baker Botts

The annual Business Meeting of PLL's Records/Conflicts Management Group was called to order at 7:00 a.m. on Tuesday, July 15 in Room C126 of the Oregon Convention Center, Portland, Oregon.

Those in attendance introduced themselves and an attendance list was circulated.

A handout providing the meeting agenda, a list of our

group's sponsored programs at past AALL conferences (seven programs in the past eleven years), and the 2007/2008 Annual Report was distributed to those in attendance.

The group discussed the success of this year's half-day workshop (W4) entitled "So Now You're Conflicts /So Now You're Docket": The Evolving Law Firm Library Manager. The assigned room was completely full and our two subject-matter expert speakers did an outstanding job.

Conferences upcoming during the remainder of 2008 were noted, specifically the International Legal Technology Association (Texas, August 2008) and ARMA International (Las Vegas, October 2008).

The discussion turned to program planning for AALL 2009. Those in attendance have the benefit of being able to participate in the topic selection process, and, after a lively discussion, we came up with a topic that we feel will be highly relevant for law librarians in all work environments, but especially for those who manage complex processes such as conflicts of interest and new business intake: "Business Process Mapping: An Alternative Approach to Workflow Management." Lee Nemchek volunteered to write up the program proposal on behalf of the group.

Meeting adjourned at 8:30 a.m.

Executive Board Meeting Minutes, *continued from page 19*

Cheryl Niemeier
Motion to approve nominations committee passed.

Longevity Awards – Discussion ensued on how to determine length of membership in PLL. Awards are given to individuals for so many years membership in AALL and a SIS. Tina will inquire into the qualifications.

Status of Independents – This group of thirty or forty people want to move to a Caucus status. This would separate them from PLL which means they would deal with their own finances. They have not approached us regarding this. Nina Platt will decide how to proceed. The Caucus is free whereas the SIS is \$15. PLL has 1500 members.

Corporate Group – The Corporate Group is facing the

same issue as the Independents, but it does not have as many members.

Tech Services – Technical Services is not developing and they may fade. PLL supports this group. There is an AALL Technical Services Group but they do not cater to smaller law firms that may use smaller databases. The PLL-SIS Technical Services Group is the voice of smaller law firm tech services people.

Future Webinars

Regional Educational Committee – is now PLL-CPE (Continuing Professional Education).
The Education Committee is now PLL-AMPC.

Meeting adjourned 6:42 p.m.

INTELLECTUAL PROPERTY GROUP BUSINESS MEETING MINUTES July 14, 2008

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

The meeting was called to order by Chair Fran Sheehan.

Fran introduced the Questel hosts and thanked them for the luncheon.

Fran then introduced and thanked the three hosts of the social networking events in the last year. She reviewed the purposes of the networking events and said anyone wishing to host one should contact the IP chair.

Fran asked for feedback on the previous evening's patent vendor panel. The panel was well attended and the response was positive.

Fran introduced the persons who would be presenting session H-5, Patent Searching Demystified. Kathy Skinner, moderator of the program, explained its purpose; to have a discussion from five IP experts from IP firms. Paulette Toth mentioned the handouts are on the IP Group's web page.

Fran said the IP website has been regularly updated with useful guides to IP practice. The IP Group has regularly contributed articles to Perspectives, PLL's quarterly newsletter, and will continue to do so.

Fran asked for a show of hands of new members. She suggested new members join the IP listserv if they have not done so.

Fran asked if anyone had any general questions about

IP. Discussion followed about standard IP treatises that are necessary in IP practice, with suggestions from several persons. Someone asked how to get all the patents owned by a company. The answer given is that there isn't one good way to do that, but the Patent Searching Demystified session would give suggestions.

Fran asked if there were any major vendor issues. Several persons expressed concerns about what will happen with Dialog now that it has been bought by Proquest. After some discussion, the consensus was to take a wait-and-see approach, and in addition Paulette will follow up with Proquest to get more information on the Dialog acquisition, and how it will affect the IP group. She will report her findings to the group.

Paulette said she is awaiting approval from USPTO to have a speaker from USPTO at the 2009 conference. She asked for ideas for other program proposals. Proposals must be submitted to PLL by August 7.

Fran asked for suggestions for Perspectives articles. She mentioned the IP mentor program. She introduced Paulette Toth as the new Chair and Kathy Skinner as Co-chair.

Respectfully submitted,
Donna M. Fisher, IP Group Member

PUBLISHING INITIATIVES CAUCUS BUSINESS MEETING MINUTES July 14, 2008

by Carol Bannen, Reinhart Boerner Van Deuren s.c., Milwaukee, WI

In attendance: Carol Bannen, Bonnie Shucha, Gail Warren, James Donovan, LaJean Humphries, Raizel Liebler, Michelle Pearse, Kimberli Morris, Joel Fishman, Charles Dyer and Mark Gediman.

Lyn Warmath was unable to join us due to a family emergency.

Our meeting was held on Monday July 14 at 7 a.m. LaJean Humphries was introduced as the incoming co-chair. Many thanks to Bonnie Shucha for co-chairing the past two years. Many thanks also to Terri Lawrence for taking care of our website for at least two years. Michelle Pearse volunteered to take over the care and maintenance of the website, listserv, and publications bibliography. Terri and Bonnie will work with her on the details. Many thanks also to Michelle for volunteering. We also thanked James Donovan for updating the Publication Resources for the Law Librarians section of the website. We did not officially ask him but hope he will continue with this.

We reviewed the accomplishments of the past year and passed around the article in the Bar Leader that talks about our efforts to connect local law librarians and bar groups. We have materials at a table in the exhibit hall.

We talked about having a presence at CONELL. We haven't been able to get there but Gail Warren volunteered to attend and promote PIC at next year's meeting in Washington DC. Carol Bannen will supply handouts for it.

We discussed liaisons to the various groups. LaJean will be our liaison with the PR Committee of AALL. Lyn Warmath is the liaison to the Association of Legal Administrators. Lucy Curci-Gonzalez is currently working with the Legal Marketing Association and had a speaker from there at the PLL lunch.

We also talked about cooperating with the Call for Papers Committee (chaired this year by Jim Heller) for a

workshop on writing. Jim is committed to organizing something along these lines for next AALL, and this seems a natural partnering for the PIC committee. He is aware of this possibility, and has been told that someone from PIC will contact him.

We brainstormed and decided we need to publicize the publication list to let people know what is being published and also to get contributors. This should emphasize the RSS feed and also tell people to repurpose articles. VALL will soon be publishing an entire new issue of the Virginia Lawyer we could highlight. Some places to contact with the information would include the president of AALL for the "From the Desktop" column, the Council of Newsletter Editors and the Chapter Presidents Council. It was also suggested we contact the State, Court and County Group and Chair of the Council of SIS Chairs. Another suggestion was to figure out how to reach out to the ABA's various standing committees. Others groups we may want to advertise to include the paralegal association, related docketing associations, litigation support groups, and ILTA.

This idea of repurposing led to a discussion of who owns the copyright of an article. This seemed to strike a chord with the group and a program proposal grew out of it. LaJean Humphries volunteered to write up a program proposal "Own Your Writing: Protecting Your Copyright in Works You Author". It is proposed as a 60-minute session that discusses how to retain your rights when negotiating publication of your work. We will look to have a copyright lawyer, editor from AALL, librarian with expertise in copyright, and an author/librarian. Publication to SSRN seems to be a hot topic among the academics and this could be discussed.

TREASURER'S REPORT

by Susan Skyzinski, PLL Treasurer, Greenberg Traurig, Orlando, FL

Treasurer's Report for 2008 Annual Meeting in Portland, OR

April 1, 2007 through March 31, 2008

Beginning Balance (04/01/2007)		\$42,587.77
Revenues		
Revenues 2007-2008		
Contributions	\$ 12,000.00	
Dues	\$ 11,235.00	
Registrations	\$ 2,720.00	
Total Revenues		\$25,955.00
Beginning Balance Plus Total Revenue		\$68,542.77
Expenses		
Expenses 2007-2008		
Food & Beverage	\$ 6,979.12	
Awards	\$ 261.60	
Misc. Expense (incl. Ann Mtg AV)	\$ 1,603.04	
Postage/Freight	\$ 32.12	
Souvenirs/Giveaways	\$ 708.94	
Transportation	\$ 1,742.88	
Total Expenses		\$11,327.70
Excess Revenue over Expenses		\$14,627.30
Ending Balance (03/31/2008)		\$57,215.07

PLL PERSPECTIVES

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