

# PLL PERSPECTIVES

THE QUARTERLY OF THE PRIVATE LAW LIBRARIES SIS OF THE AMERICAN ASSOCIATION OF LAW LIBRARIES

Volume 18 Issue 2

WINTER 2007

## REWARDS OF IMPLEMENTING A BEST PRACTICES PROGRAM

Elizabeth Chiapperi, Nixon Peabody LLP, Rochester, NY

More than two years ago, the firm-wide library department at Nixon Peabody LLP began a unique initiative with lofty goals: to improve and standardize library practices across the firm by developing a best practices program, through which we aimed to work toward achieving the library's strategic plan. Today, we have come a long way and enjoyed many successes. Since the success of this program depended on planning and participation at all levels of the library, we decided to include perspectives drawn from all levels – manager, staff, and director – as we share our experience.

### **Manager Perspective: Establishing the Best Practices Program**

Amy Bruce, Manager, New England Libraries

After four mergers in four years, the library staff of Nixon Peabody LLP determined it was necessary to create a strategic plan for the future. The growth of the firm had increased the library staff to 23 members and involved the acquisition of libraries with different technologies, cultures, ways of doing things, and even time zones, with the addition of West Coast offices. Undergoing all these changes over such a short period of time had resulted in a library focused on managing for the short term rather than the future. It was time to step back and determine who we were, where we should be going, and how to get there.

The process for developing a strategic plan began with a meeting of the director and library managers. The management team knew that it needed to work better across offices and establish consistent procedures, as well as provide professional development opportunities. We performed a Strengths, Weaknesses, Opportunities, and Threats (“SWOT”) analysis, to create a library vision and goals, and to align our goals with those of the firm. Through this process, the management team set five goals: increase visibility and expand customer base; select best information at best cost; continually develop knowledge and skills; work efficiently across the firm; and contribute positively to the firm's financial results.

The next step was to create action plans to achieve the goals set for the department. To gain buy-in and to accomplish the challenging goals, this stage had to be collaborative and involve all members of the library. Department-wide involvement would also let the management team draw on the accumulated knowledge of an experienced staff, each with individual strengths. The management team determined that the most effective way to involve the staff was to create best practices teams.

We established four such teams, based on our goals and operations: Reference, Professional Development, Technical Services, and Marketing, each consisting of and led by staff members, with a manager as an advisor. The management team set a charter for each team, and each team was tasked with examining current procedures, establishing more efficient practices, and creating action plans to carry out its goals.

We presented the plan at a firm-wide library meeting, and the department agreed to move forward on the best practices initiative. Staff members were assigned to teams based on individual preference, job function, and office location. To build relationships across the firm, the teams were composed of members from different office locations. This also allowed the differences in office cultures and procedures to be represented in each best practices team. Once the team assignments were set and leaders were appointed, the teams began working toward accomplishing their charter goals.

### **Staff Perspective: Implementing the Best Practices Program**

Pam Warren, Reference Librarian, Boston

When the library staff received our team assignments and charters, with a deadline of just four months for presenting our recommendations to the group, we realized that quite a challenge lay ahead of us. Luckily, resources were available to let us launch the best practices initiative by conducting our first team meetings in person. These in-person meetings were crucial. Since we would

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**PLL PERSPECTIVES DEADLINES**

**Fall:** August 15 **Winter:** October 15  
**Spring:** January 15 **Summer:** April 15

## FROM THE CHAIR

by Christine L. Graesser, Rudnick, Berlack, Israels LLP, Hartford, CT

It's good to have a plan, for obvious reasons. The following is the PLL-SIS Vision Statement and Strategic Directives for 2006-2009. These were formulated by the Strategic Plan Committee, chaired by Martha Goldman, and the 2005-2006 PLL-SIS Executive Board.

### PLL-SIS STRATEGIC DIRECTIVES 2006 – 2009 Vision Statement

Private law librarians support the provision of superior client service via the use of best practices, technology, education, cost-effective resource selection and allocation and application of excellent skills. We assimilate constant change in the external and internal legal environments while assuming diverse roles and responsibilities within our organizations. Private law librarians are information leaders in the local and national legal and library communities.

#### Strategic Directives

##### GOAL I – Leadership

1. OBJECTIVE: To position librarians as information leaders
2. OBJECTIVE: To enhance the PLL member's experience
3. OBJECTIVE: To continue presentation of the annual Leadership Award

##### GOAL II - Member Participation

1. OBJECTIVE: To recruit new members to PLL
2. OBJECTIVE: To work with AALL headquarters to accurately determine the amount of funds available for travel grants
3. OBJECTIVE: To provide opportunities for more PLL members to become active at a variety of levels

##### GOAL III – Education

1. OBJECTIVE: To increase and refine librarians' skills to meet the changing needs of the information landscape
2. OBJECTIVE: To sponsor or co-sponsor programs delivered at national, regional and local levels of law-related organizations such as the Association of Records Managers and Administrators (ARMA), Legal Marketing Association (LMA) and the Association of Legal Administrators (ALA)
3. OBJECTIVE: To present regional/local programs under the auspices of the AALL Education Summit
4. OBJECTIVE: To foster a growing interest in the competitive intelligence responsibilities of private law librarians

##### Goal IV – Advocacy

1. OBJECTIVE: To develop ongoing partnerships with other professional organizations that support private law firms

such as the Association of Legal Administrators (ALA), the Legal Marketing Association (LMA), International Legal Technology Association (ILTA) and the American Bar Association Law Practice Management Section (ABA-LPMS)

2. OBJECTIVE: To work with vendors and publishers to advocate mutual goals
3. OBJECTIVE: To have more PLL members contribute to professional library journals and legal information publications

Directives are good, but what is being accomplished on the ground?

#### Leadership

We are pursuing a public dialogue within PLL on the merits of librarians pursuing leadership roles in AALL and in their own places of employment. Our newsletter will concentrate on leadership issues for the 2006-07 year.

#### Membership participation

We plan to audit our membership rolls this year and issue invitations to those private law librarians who have not joined the SIS. We will continue to provide opportunities for librarians to volunteer for various PLL projects.

PLL-SIS continues to offer travel grants for Annual Meeting attendance.

#### Education

While continuing to sponsor programs at the Annual Meeting, we are now developing regional programs to make professional development accessible to more members. A regional education committee has been formed. Two regional programs have taken place so far with more to come.

A Competitive Intelligence Caucus has been formed, with its own listserv.

#### Advocacy

Our Public Relations co-chairs have an ambitious agenda for this year, beginning with a web page devoted to PR and marketing tools, particularly National Library Week resources.

We are talking with the Association of Legal Administrators (ALA) about the roles of librarians in firms. We plan to do the same with the Legal Marketing Association.

Speaking of the ALA, we have been invited to provide articles for an ALA annual publication on law firm management.

If you are interested in working on any of our initiatives, or have any questions about our Strategic Directives or our plans for this year, feel free to contact me.

Best Practices, *continued from page 1*

subsequently work primarily via e-mail and conference calls, establishing good working relationships early on was key to our success. Each team spent a day getting to know each other better, while coming up with a plan for tackling their charter goals.

All of the teams emerged from the meetings with ideas of their own, as well as plans to solicit information and suggestions from all library staff. We used surveys, interviews, and requests for documentation to gather input from our colleagues. With feedback in hand, the teams developed recommendations for the group and prepared to present these recommendations at our first-ever all-hands library meeting, a summit that took place over two days. The group displayed sustained interest as the teams' recommendations were unveiled. The response from the department as a whole was quite positive, and we agreed that the teams should move forward with implementing all of the suggested initiatives. We emerged from the department summit energized and ready to make positive changes.

The next few months brought exciting developments and accomplishments as the teams put the new initiatives into action. All of the teams achieved remarkable success.

The Reference team, with the help of our technical services manager, developed several databases to help us track common reference functions. One of these – the reference database – provides a centralized repository for storing and sharing unique resources for hard-to-find information, useful websites, and our firm-wide and local subscription databases. As we have become accustomed to entering information into and retrieving data from it, the database has become an important tool for our reference staff, and one we use daily.

The Technical Services team standardized and streamlined the main technical services functions across all offices, resulting in greater efficiency in this area. They also created a Technical Services Manual – an invaluable tool for helping us “non-techies” find our way around SydneyPlus, the library automation solution for our catalog and other information management.

The Marketing team created standardized orientation materials to ensure that we present a consistent message about library services to new hires and existing staff firm-wide. They also wrote and distributed the library's first-ever annual report, which increased library visibility by highlighting some of our major accomplishments over the past year.

As a member of the Professional Development team, I take great pride in my own team's accomplishments. We developed a website on the firm intranet that serves as a repository for library professional development information, with links to continuing education providers (both online and in each office's region), and folders for professional development resources, such as library policy documents, conference materials, and staff reports on the

conferences and seminars attended. We also started a professional development newsletter, published monthly. Each newsletter alerts the library staff to upcoming webinars of interest, highlights published articles on a chosen topic, and announces the winner in a new monthly contest: “Reference Request of the Month,” in which staff report their most difficult or strangest requests and share their approaches to tackling these challenges.

Our most popular new initiative has been the job shadow/exchange program. Through this program, library staff members travel to other offices within the firm to spend the day working with a counterpart in that office. These experiences have strengthened cross-office connections and enhanced our success in sharing tips and ideas, and in learning from each other.

These are just a few of the most significant achievements of each team. We have accomplished even more than can be described here. While the best practices program has clearly brought many positive changes to the firm-wide library department, it has also been an extremely beneficial experience for the staff participating in the teams. Whether writing a manual or an annual report, or developing a website or a database, undertaking the best practices projects required all of us to stretch beyond our day-to-day tasks and challenged us to learn new skills. It provided opportunities to develop or improve leadership skills, especially for those staff who were appointed team leaders and had never held leadership positions before. As leadership on several of the teams has rotated, even more of us have benefited from having a chance to lead a team. We have also had opportunities to develop presentation skills, since each team had to present its recommendations to the department, and project management skills, as several of our projects were large-scale endeavors, requiring the collaboration of many people and taking weeks or months to accomplish.

Another major benefit to the staff resulted from having the chance to affect the big picture. Most of the library staff, as non-managers, do not usually participate in strategic planning for the department. Through the best practices teams, we were able to look beyond our usual day-to-day duties and responsibilities, evaluate the state of the library firm-wide from our own perspectives, set concrete goals for our target areas, and work to achieve those goals – an extremely satisfying process.

One of the goals in establishing the teams was to make the firm-wide library stronger and more efficient, and many of our improvements did just that. Equally important, the very process of participating on the teams together has been just as powerful a factor in our success as the actual programs and practices we put into place, due to the personal and professional growth we have experienced and the strong cross-office relationships we have developed along the way.

*Continued on page 5*

**Director Perspective: A 360° Success!**

Elizabeth Chiapperi, Director of Information Services

The results of the Nixon Peabody library's best practices efforts have greatly exceeded everyone's expectations. We began our journey with excitement and optimism, but also a healthy dose of apprehension. The proposed job exchange/shadow initiative, for instance, had a consensus to move forward, but – understandably – the initial reaction was one of anxiety; no one was clamoring to be first. Our first participants took a leap of faith, though, and were pleasantly surprised by how much they gained personally and professionally from the experience. Their overwhelmingly positive message resonated with and encouraged everyone else in the library staff.

The best practices teams provided the opportunity for staff at all levels to get involved in guiding the strategic initiative. Nixon Peabody was recently recognized as a best place to work by FORTUNE magazine, and our best practices program is just one of the many examples that

make Nixon Peabody a unique and best place to work.

The benefits gained from all of our best practices initiatives have far outweighed the cost. We have created an empowering team environment that invites professional growth and promotes high job satisfaction. It is a delight to watch an individual stretch beyond his or her comfort zone and emerge as a stronger performer, which benefits not only the individual, but also the library and the firm. We have established a unifying vision, developed stronger cross-office relationships, and improved our productivity, while enhancing and expanding our services. As a result, the Nixon Peabody library is better positioned for the future. Our best practices initiatives continue to evolve and we are looking forward to the next step in our journey.

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## CALL FOR ARTICLES

*Perspectives* is looking for ideas and authors for future articles. Possible topics include profiles of members who are leaders, practical approaches and solutions to everyday issues and problems faced by law librarians, book and website reviews, reports on meetings or conferences attended, practice-specific tools, and other areas of interest to our readers. If you would like to suggest a topic or are interested in writing an article, please contact either Donna M. Fisher, [Dfisher@senniger.com](mailto:Dfisher@senniger.com) or Randy Thompson, [Randy.Thompson@law.lsu.edu](mailto:Randy.Thompson@law.lsu.edu).

## WASHINGTON IS FOR LEADERS: A REVIEW OF THE 2006 LAW FIRM LIBRARY MANAGEMENT WORKSHOP

by Elaine Knecht, Hiscock Barclay, LLP, Buffalo, NY

You heard that it snowed in Buffalo, New York in October? That we had 22 inches of wet, heavy snow in two days? That hundreds, maybe thousand of trees were either destroyed or seriously compromised? That tens of thousands of area residents were without power for up to 10 days? Well, I live in Buffalo. We lost most of a 40 foot maple tree and were without electricity for seven full days. Needless to say, I was thrilled to go to Washington, DC, right in the middle of this disaster, for the Law Firm Library Management Workshop: Solutions and Scenarios.

This program was one of the first, if not the first, to be funded under AALL's new Continuing Education Grant Program. According to the Professional Education section of [www.aallnet.org](http://www.aallnet.org), this program "provides funding to AALL HQ, chapters, SIS's, member institutions and individual AALL members to assist in providing ongoing quality continuing education programming outside of the AALL annual meeting, which can be distributed to a wider audience." The creators and producers of the October workshop looked for a more or less central location, convenient for a one-day event. They identified several topics of interest, surveyed the members of the PLL section, and decided on the workshop from which about 70 librarians benefited on that warm, dry, electricity-powered day in DC.

The presentations were full of good ideas and practical advice. The two breakout sessions gave small groups the opportunity to share stories of both success and failure (and as Sir Winston Churchill reminds us, "Success is the ability to go from one failure to another with no loss of enthusiasm.") And the food was excellent.

Carolyn Ahearn (Director of Library Services) and Barry Strauss (Executive Director), both from Wiley Rein & Fielding, LLP, talked about how to show your firm that the services you provide and the materials you oversee are a necessary and valuable addition to the practice. Mr. Strauss discussed what the Executive Director of a firm needs to know to make good decisions on behalf of the library. Gitelle Seer, the Director of Library and Research Services for Dewey Ballantine LLP, spoke about building relationships: why they are important and how they can solidify in the minds of our attorneys their need for the library and our services. The Library Director at BNA, Marilyn Bromley, gave a start-to-finish review of how BNA conducted a Return on Investment study in their corporate library, the outcome of which was a very heartening statistic. Ms. Bromley and her ROI project staff, after asking and answering questions like, "How has the library saved employees' time (and by extension, BNA money)?" were able to show that the library returns \$1.26 for every dollar spent. You can read her case study on the project at [http://quantum.dialog.com/q2\\_resources/casestudies/roi.pdf](http://quantum.dialog.com/q2_resources/casestudies/roi.pdf).

Before my memory faded, even before leaving

Washington, I made these notes about the day. As you think about these points with respect to your own library, I have no doubt but that you will quickly be able to integrate these ideas into your daily/weekly/monthly/annual schedule. The four main points:

1. Build relationships – with attorneys, paralegals, administrators, support personnel. Do this by doing your job and then some. The more people who appreciate what you do, the easier it will be to garner support for your library's projects and needs.
2. Get out of the library – find out what's going on in the firm. Identify major clients (with the help of the accounting department). Subscribe to RSS feeds that will keep you up-to-date on what's going on with those clients. Approach practice group leaders with questions about their needs and come back with some ways the library can help meet those needs.
3. Have facts and figures – when you need or want to request something for the library, be able to demonstrate to your Executive Director that "87% of our staff appreciate electronic delivery; 60% of our attorneys who deal with bankruptcy say that they will make daily use of this new resource; 50% of my time is consumed by filing. I would be able to serve the attorneys better if we bring in a filing service."
4. Demonstrate positive ROI – while a fully-staffed corporate library may have an easier time of a full-scale ROI study, firm librarians can make sure the firm's money is being spent wisely by finding out about exactly how (and by whom, and how often) our materials are being used. "If we change to electronic delivery of this newsletter, we may save 25% of the print costs, and 40% more attorneys will have access to this information."

October 18<sup>th</sup> was a day well-spent, filled with material that I know I will be referring to and using during my tenure as our library's director. Several of my tablemates agreed, saying that this was perhaps the most valuable AALL educational event they had ever attended. We look forward to many more such opportunities.

## OUT WITH PRINT AND IN WITH ELECTRONIC: THE DECISION PROCESS FOR CANCELING PRINT SUBSCRIPTIONS

by Patricia Orr, Dykema PLLC, Detroit, MI

Dykema began the transition from print to electronic format more than ten years ago. Sometimes we thought we would never survive the objections, both real or imagined, to taking away the bound reporters, the loose-leaf treatises, and the monthly journals. Fortunately, online research has become a common practice for attorneys and legal specialists, due in large part to the efforts of publishers to add archived content, federated searching, and customized search capability to their products.

The decision as to whether or not to replace a print title with electronic format involves the reference staff, the practice group affected, the Information Services Department, and the Finance Department. Librarians often experience problems with misrouted publications, missing pages, and missing back copies of a title. When such problems occur frequently, the option of moving to electronic format is explored. Recommendations are made to the practice group leader, who usually surveys the group members for input. The Information Services Department adds the content to the network and provides access according to the terms of the product license. IS staff troubleshoots any computer that may be having problems getting to a source.

During the annual budget planning process, the Finance Department gives general direction to all firm departments regarding planning for the new fiscal year. Cost containment and efficiency is stressed every year, just before the deadline for submission is announced. It is a continuing reminder to everyone to make the most effective use of firm resources. Moving to electronic formats and canceling duplicate print subscriptions will save Dykema \$45,000 to \$50,000 in fiscal year 2007.

Recent decisions were initiated by practice groups when a new group leader was appointed. Dykema has ten offices with practice groups distributed among them. The Intellectual Property group wanted to provide access to standard treatises and journals to all its members, on an equal, timely basis. Treatises were replaced with

networked CD-ROM access. BNA electronic journal subscriptions to United States Patents Quarterly and the Patent, Trademark, and Copyright Journal replaced print subscriptions.

In addition to providing information in a timely manner there are other benefits to canceling print formats. Missing pages, missing chapters, and missing copies are no longer a problem. Content is online and therefore available to the attorney or legal specialist "on demand". The last attorney on a routing list isn't waiting for days, weeks, or months for a journal to arrive in the mailbox. Instead, it will arrive in his/her e-mail in-box right on schedule.

Among the titles Dykema has cancelled in print are CCH titles available via our subscriptions to the Internet Business Library and the Internet Health Care Library. Corporate, bankruptcy, and tax and estates attorneys have access to the Business Library. The tax and estates group has online subscriptions to the RIA Checkpoint service and the BNA Daily Tax Report.

In the 2007 fiscal year, we anticipate replacing our Michigan Institute of Continuing Legal Education print resources with all available online titles. Not only will our attorneys have access to information that is updated regularly, they will also avoid the frustration of needing a resource only to discover a colleague is using it away from the office.

The impact of this transition on library operations has been positive for the most part. Rather than routing physical copies, titles are routed by the circulation staff electronically. User password files are maintained in a central database as a courtesy to all attorneys and legal specialists. Access to training and troubleshooting are services the library facilitates.

It isn't additional work, nor is it less work to migrate to electronic format. It provides cost effective, timely, and efficient access to information for our users, which is, coincidentally, the Mission Statement of the Dykema Libraries.

## DOCUMENT DELIVERY FOR IP LAW – UNIQUE RESOURCES FOR A UNIQUE PRACTICE

By Amanda S. Merk, Fish & Richardson P.C., Boston, MA

I am a librarian at Fish & Richardson P.C., a national intellectual property law firm. I am also an active member of the PLL IP Caucus, and as I get to know more AALL members and learn about other types of law firms, I realize how unique IP information services and documents are. Intellectual property law may be the most information hungry of all of the legal practices. Information users at general practice firms can be quite self-sufficient, often able to locate documents, cases, and other types of information on their own electronically. This is not so with IP law.

The process of applying for patent or trademark protection, and providing legal protection for intellectual assets, requires a great deal of intricate, complex research and voluminous documentation. This article will concern itself with best practices employed at the nation's top IP law firms to procure a unique set of documents known as "prior art references." Prior art references are essential to the IP practice, and it is essential that the library or information center staff know how to retrieve them efficiently.

The complete list of types of documents required by an IP practice are too numerous to mention here. It is the hope of the members of the IP Caucus that this article will serve as the first in a series of primers on IP information resources. We feel that this topic is of interest to a wide audience because the past few years have seen an increase in mergers between general practice firms and IP boutiques. We see this reflected in our IP Caucus membership with more and more general practice law librarians turning to us for assistance with IP resources. More than once over the past few years we've been approached by a law librarian with many years of experience suddenly faced with IP attorneys who are asking her for "prior art references." "What is prior art," they ask us, "and how on earth do I locate it?"

Prior art references are the technical or scientific documents required for intellectual property law. They may be references cited on the face of a patent and submitted with the patent application to the patent office, or they may be required as evidence when a patent is being litigated. The vast majority of prior art documents (also known as cited references) are peer reviewed scientific journal articles. In other cases, prior art can actually be a book or some portion of a book. Prior art references can also be copies of industry standards, obscure technical reports, product announcements, or manuals.

A busy group of IP attorneys can generate hundreds of citations for prior art references each week. They will send these lists of citations to their law library or information center, and library staff must be familiar with

the best methods of locating copies quickly and inexpensively. Another hallmark of the IP practice is its cost-conscious clientele, and therefore the successful IP librarian becomes a budget shopper when it comes to prior art.

So just how does a law librarian go about providing inexpensive prior art articles in a timely manner? To find the answer to this question, I consulted the experts. I surveyed law librarians at the nation's top IP firms. I polled librarians who have been successful at tracking down, and delivering, a high volume of prior art references day in and day out for many years. The results of my survey were not surprising. Most IP librarians employ the same methods, and utilize many of the same document delivery vendors, to supply their firms with prior art.

All of the librarians I questioned had developed their own local resources for prior art references and also use well known national and international document vendors. Local resources usually consist of regional academic libraries. For instance, Virginia McNitt and Javii Davis, librarians at Finnegan, Henderson, Farabow, Garrett & Dunner, reported using Penco, "a local Washington, DC area document retrieval service. Penco retrieves documents from most DC area libraries-- National Institutes of Health (NIH), National Library of Medicine (NLM), Library of Congress, and universities." IP librarians from firms in California utilize the University of California libraries such as Berkeley and Stanford. However, according to Joanne Scala, of the Palo Alto office of Morrison & Foerster, these local university libraries are usually very small operations, best suited to an occasional interlibrary loan request rather than the continuous high volume of prior art required by most IP firms.

For high volume document delivery needs, Joanne Scala is in agreement with her colleague, Betsy Chessler, of the San Diego office of Morrison & Foerster. Betsy says that Morrison & Foerster's "vendor of choice is Wisconsin Tech Search (WTS) based at the University of Wisconsin--Madison." According to Betsy, "WTS has a very simple online order form that allows me to order multiple articles at once. I can order dozens of articles extremely quickly because I simply cut and paste the citations into the order box. WTS by default always copies the cover page/copyright page of each article/conference proceeding/book chapter. This is incredibly helpful. They have rush options of 4-8 hours, but I have found that turnaround for their regular delivery (1-3 days) is quite fast, usually the same day. All articles are sent to me via email, in PDF format.

*Continued on page 9*

They will also call me if there are any problems with my order. Recently I requested an article with many photographs. They actually took the time to photocopy it on two different settings and send me both formats, so that one copy would display the text more clearly and the other copy would display the photos more clearly. They did this on their own initiative. I was very impressed and pleased. They are an amazing service, and I highly recommend them.”

The top document vendors of choice for other major IP firms were CISTI (the national scientific library of Canada), the British Library, ESTIS (a document service of the University of Minnesota catering to corporate clients), and the New York Public Library Express Information Services. Paulette Toth, of the New York office of Kirkland and Ellis, also mentioned that her firm makes use of BIS--the Biomedical Information Service at the University of Minnesota--as a good resource for medical papers.

Fred Peal, one of two full time librarians at the New York office of Ropes & Gray, whose primary responsibility is to track down prior art for the firm, told me, “we are able to obtain the vast majority of the art that we are asked to track down from general document delivery services such as CISTI, the British Library, services attached to the Universities of Wisconsin and Minnesota, and others. Recently we have begun to use a web-based service geared specifically toward IP called Ip.com, which includes many useful sources like the IBM Technical Disclosure Bulletin. Another good web-based source, since a lot of our business relates to computers, is the National Computer Science Technical Reference Library (NCSTRL).”

At Fish & Richardson P.C., where I have worked for the past five and a half years, we retrieve a high volume of prior art references. We use the same vendors that our fellow IP librarians mentioned above, and we also use one service that no one else mentioned. A year or so ago we discovered a company in Chico, CA called Research Solutions, and we have been using them for document delivery with good results since then. In fact, Research Solutions has become our number one vendor for rush orders. Their customer service is top notch, their turn-around times are fast, and their prices are very reasonable.

All of the IP librarians I consulted agreed that the best document vendors have web-based online order forms. Another consideration in choosing a document vendor is their ability to respond quickly, and continuously, to extreme rush requests. Some vendors are excellent with an occasional order, or an occasional rush request, but for the busy IP practice, a vendor must be able to maintain the same level of service over time. IP librarians are also very concerned with the cost of articles and the ability of vendors ability to produce monthly invoices upon request. They can easily input your client matters into these monthly statements, which can then be submitted to your accounting department for processing. If you send a document delivery vendor a high volume of work, you

should consider asking them for discounted prices based on bulk ordering. At Fish & Richardson P.C., we have asked vendors to reduce prices based on volume, and many have been willing to negotiate.

Another factor to consider when looking at potential vendors is their flexibility and their willingness to go “above and beyond” to deliver superior customer service. Any document vendor you use should be able to handle special requests. For instance, prior art references often contain photographs which must be clearly reproduced, and a document vendor must be able to produce excellent quality copies. Some vendors provide “clean copy” service, which must be submitted as a special request. A clean copy should be photographic quality. Many vendors also produce color copies on request.

To summarize, most IP firms develop some local resources for retrieving articles, but these must be supplemented with national or international document delivery vendors. The most important traits to look for in a document supplier are ability to handle rush orders, consistent good service, ease of ordering, online accessibility, ease of invoicing, and cost of prior art references.

If you are a law librarian who supports an IP group you will quickly find that your document vendors become your best friends! You will need to be able to count on them day in and day out as you retrieve and deliver hundreds of copies of prior art to your firm.

Here is a list of the document delivery vendors recommended by law librarians from the nation’s largest IP firms:

BIS (Biomedical Information Service at the University of Minnesota)

<http://www.bis.lib.umn.edu/>

British Library

<https://www.bl.uk/services/document/lexformn.html>

CISTI (the national scientific library of Canada)

[http://cisti-icist.nrc-cnrc.gc.ca/docdel/docdel\\_e.html](http://cisti-icist.nrc-cnrc.gc.ca/docdel/docdel_e.html)

ESTIS (a document service catering to corporate clients out of the University of Minnesota)

<http://www.lib.umn.edu/site/estis.phtml>

IP.com

<http://www.ip.com/about/>

Linda Hall (especially good for engineering references)

[http://www.lindahall.org/services/document\\_delivery/index.shtml](http://www.lindahall.org/services/document_delivery/index.shtml)

National Computer Science Technical Reference Library (NCSTRL)

<http://www.ncstrl.org/>

New York Public Library Express Information Services

<http://www.nypl.org/express/>

Penco (document service local to the Washington DC area)

<http://www.penco-info.com/services.html>

Research Solutions

<http://www.4researchsolutions.com/>

WTS (Wisconsin Tech Search)

<http://wendtcs.engr.wisc.edu/>

## PLL LISTSERV ETIQUETTE

Terry Psarras, Carlton Fields, Tampa, FL

If I get another email in my inbox I am going to scream!!! Based on conversations with friends and colleagues, as well as perusal of recent literature on work environments and communication, surely I am not the only one who feels this way, right? That would of course imply that no one needs another subscription to another listserv. Fortunately or not, one more listserv is not necessarily a bad idea, and it may be something you want to go ahead and sign up for.

As PLL members, we all enjoy communicating with our peers. Sometimes we get help, professional or mental. Sometimes we get to vent, and that is helpful in its own way. Sometimes we get announcements from PLL leadership. Sometimes we even accidentally send out announcements to the entire group that were certainly NOT meant for the entire group. A lot of that communication is being done via a multitude of listservs. If you are like most of us, you subscribe to law-lib, PLL-SIS, and possibly others that are more specific or particular to your specialties or fields of expertise. I am not even counting the personal interest listservs we all subscribe to. That's a whole lot of email when it is all said and done.

Every AALL member who also becomes a PLL member by paying the proper dues is automatically subscribed to PLL-SIS. The purpose of this listserv has unfortunately changed over time. It was initially created so that the board could communicate with PLL membership on matters relating to our section. Over the last couple of years it has evolved into a general purpose listserv, where anything goes. The board is attempting to change this. We are trying to steer general purpose activity--such as requests for assistance, ILL requests, consumer surveys, needs and offers--towards the PrivateLawLib listserv, and keep PLL-SIS for Private Law Libraries issues related activity. In order to keep communication flowing both ways between members and the board, anyone who is subscribed to the listserv can post a message, and no moderator pre-approval is required.

We understand that this move is popular with some but not others. We have received a lot of feedback from the membership which leads us to believe this is the proper way to proceed.

Below is a brief summary of the available PLL related listservs.

### Private Law Libraries SIS

Name: pll-sis

- Subscription only via Administrator, as part of PLL membership benefits
- Post a message to: [pll-sis@aallnet.org](mailto:pll-sis@aallnet.org)
- Unsubscribe: [leave-pll-sis@aallnet.org](mailto:leave-pll-sis@aallnet.org)
- View the current postings and archives on-line: <http://share.aallnet.org/read/?forum=pll-sis>
- Owner: [owner-pll-sis@aallnet.org](mailto:owner-pll-sis@aallnet.org)

### PrivateLawLib

- Your everyday alternative
- Subscribe or unsubscribe via a web browser: <http://lists.washlaw.edu/mailman/listinfo/privatelawlib>
- Post a message to: [privatelawlib@lists.washlaw.edu](mailto:privatelawlib@lists.washlaw.edu)
- Owner: [privatelawlib-owner@lists.washlaw.edu](mailto:privatelawlib-owner@lists.washlaw.edu)
- Is also available under Digest format, which means you can get a single email daily with all the postings for the last 24 hours.

### Other PLL owned "Specialty" listservs

#### PLL-CALR -- Private Law Libraries: CALR Cost Recovery

- Subscribe via web browser: [http://share.aallnet.org/read/all\\_forums/subscribe?name=pll-calr](http://share.aallnet.org/read/all_forums/subscribe?name=pll-calr)

#### PLL-KM -- Private Law Libraries: Competitive Intelligence Caucus

- Subscribe via web browser: [http://share.aallnet.org/read/all\\_forums/subscribe?name=pll-cic](http://share.aallnet.org/read/all_forums/subscribe?name=pll-cic)

#### PLL-IPLL -- Private Law Libraries: Intellectual Property

- Forum Closed-Can only be Added by Administrator;

#### PLL-KM -- Private Law Libraries: Knowledge Management

- Forum Closed-Can only be Added by Administrator;

#### PLL-LEGALREC-SIS -- Legal Records

- Subscribe via a web browser: [http://share.aallnet.org/read/all\\_forums/subscribe?name=pll-legalrec-sis](http://share.aallnet.org/read/all_forums/subscribe?name=pll-legalrec-sis)
- Owner: Lee Nemchek, Information Resources Manager at Morrison & Foerster LLP, [lnemchek@mfo.com](mailto:lnemchek@mfo.com)

#### PLL-MULTILIB-L -- Private Law Libraries: Multiple Person Libraries (public)

- Forum Closed-Can only be Added by Administrator;

#### PLL-OPLL-L -- Private Law Libraries: One Person Libraries (private)

- Subscribe via a web browser: [http://share.aallnet.org/read/all\\_forums/subscribe?name=pll-opll-l](http://share.aallnet.org/read/all_forums/subscribe?name=pll-opll-l)

#### PLL-SPECIAL -- Special Topics

- Forum Closed-Can only be Added by Administrator

## PLL BUSINESS MEETING JULY 9, 2006, ST. LOUIS, MO

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

The meeting was called to order by President Terry Psarras at 7:30 AM.

A motion to adopt the 2005 minutes was made by Sarah Mauldin and seconded by Isabelle West; the motion was carried by acclamation.

Terry thanked BNA and its COO, Greg McCaffery, for their support of our business meeting. He then introduced the board (Christine L. Graesser, Sue H. Johnson, Kaye Waelde, Patricia E. Barbone, Lynn Fogle, Mary J. Koshollek) and thanked them for their service.

Special guests at the meeting included:

Katherine Coolidge, from SLA, Legal Division. SLA and PLL are working on some collaborative efforts to benefit both groups.

Marilyn Bromley, 2007 Program Chair.

Lynn Warmuth, Publishing Initiative Caucus. She spoke about two ongoing projects: targeting publications outside library literature for placement of articles about law libraries and legal research (volunteer authors welcome), and a program proposal for the 2007 Annual Meeting concerning the ways we can work with journal publishers and editors.

**Chair's Report:** Terry reported that the Toolkit has been completed and the Leadership in PLL Award program is in place. The Education Committee had ten Annual Meeting Program Committee programs and three alternative programs for 2007. The 2006 election was the first electronic SIS election and while there were a few glitches, it turned out well. *Perspectives* is now only in electronic form. He also recognized Ann Fessenden (AALL incoming VP) who encouraged us to volunteer for committees.

**Secretary's Report:** Kay reported that in spite of a few bumps in the electronic election process, we had 598 ballots returned, more than in 2005's hard copy ballot.

**Treasurer's Report:** Patricia reported that the SIS is fiscally sound, with a current balance of \$27,811.42.

### COMMITTEE REPORTS

**By-laws:** No changes required.

**Centennial:** Elizabeth Le Doux reported on a great lunch and an excellent presentation by Gitelle Seer.

**Educational Committee:** Twenty proposals were

submitted for programs for the 2006 meeting.

**Grants Committee:** Five travel grants were made. Under the newly adopted procedures, applicants will no longer need to provide two letters of recommendation, only their own application.

**Mentoring:** Five matches were arranged. There were eleven more volunteer mentors than requests for mentors. Stephanie Fox reported plans to promote the program via CONELL.

**Newsletter:** Randy Thompson reported that four issues were produced this year, two of which were themed issues. The newsletter is now exclusively web-based; an e-mail notice is sent to members advising of its availability when ready. Randy also thanked the vendors who have supported us (GSI, BNA, Skyminder, Thomson West & Walters Kluwer).

Jan Brown was recognized for nine years service as Newsletter Editor.

**Toolkit:** LaJean Humphries proudly announced the Toolkit is done. Terry called her to the stage to thank her and her committee for all their hard work.

**Public Relations:** The PR Committee reported a quiet year. They staffed an information table at CONELL and in the Annual Meeting Activities area. This year they plan for more activity including a review of printed material, using web pages and how to better use National Library Week as a resource. This is an area that needs some volunteers.

**Strategic Plan:** Martha Goldman reported that the framework of four goals with objectives and actions (the latter still to be formalized) has been drafted and reviewed by the board. The resources required for each objective are yet to be fully determined.

### GROUP REPORTS

**Corporate:** Used table ID cards at the luncheon to improve networking and discussion among members.

**IP:** Placed a program at the Annual Meeting for the second year in a row.

**OPL:** Announced a group meeting at 5:45 in the Americas Center.

*Continued on page 12*

PLL Business Meeting Minutes, *continued from page 11*

**Records:** Lee Nemchek reported a fairly quiet year after several of great activity. Sponsored programs at ALA (three programs), ILTA Records Management Track (four Programs) and an ARMA two-day pre-conference on legal records.

**Tech Services:** The business meeting for the group included a program on upgrading/migration.

**Nominations Committee:** Jane McMahon reported a full slate of excellent candidates.

There was no old business.

**New Business:**

Al Podboy encouraged everyone who qualified to get a pink “I ran” ribbon from the registration desk.

It was requested that we review the listserv policy concerning the use of it for questions not relating to PLL Business.

Social Responsibility SIS asked us to consider what we could do next year beyond a book drive. Kathy Sullivan suggested the association consider arranging a post conference workday to help New Orleans.

At 8:32 Terry turned over the meeting and the leadership of PLL to Chris Graesser.

Chris reported on the Board meeting, specifically on the value of the strategic plan as a tool to keep us on course. We are an association. We cannot wait for someone else to do what needs to be done. We must all step up and do it.

The meeting adjourned at 8:46.

Respectfully submitted,

Lynn Connor Merring,  
Secretary

**PLL PERSPECTIVES**

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