

PLL PERSPECTIVES

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FALL 2001

MINNEAPOLIS: A PERSONAL VIEW

by Linda Jean Schneider

Drinker, Biddle & Reath, LLP, Philadelphia, PA

After a year of non-attendance due to the move of my firm's headquarters in 1999, and being participant, guide, and planner for the 2000 Conference in Philadelphia and all of the distractions that entailed, I approached the 2001 Meeting in Minneapolis with more than trepidation. After so many years "in the trenches," would the meetings be worthwhile, substantive, and even relevant? Would I be able to focus on the content (and even sit still) in contrast to my multi-tasking days on the run at the firm? Could I simply keep up with the mad whirl of parties, entertainment, and vendor giveaways without collapsing in exhaustion?

Fortunately for me, a colleague, although experienced, was attending her first AALL Conference; and this compelled me to pull together an itinerary for the two of us rather than haphazardly approaching the schedule. And I expected to encounter longtime friends and colleagues to confirm my choices along the way. It certainly looked promising, with intermediate and advanced sessions, and numerous relevant topics listed.

Becoming familiar with the Convention Center was the first order of business. Over-priced carts and stands offered a limited array of breakfast fare, and we found our way to a seating area that was inconveniently located to review our itinerary. Those chairs mysteriously disappeared at some later point – perhaps as part of the Convention Center's plan or that of vendors who wanted us to spend time in the exhibits. Fortunately, better breakfast options awaited us on subsequent mornings.

Sunday was a meeting-filled day, despite the fact that we did not start until the 10:00 Sessions. The first one on our agenda, "Redefining the Law Firm: New Realities and New Roles for Law Librarians in the Legal Marketplace," followed the pattern established at my own contributory session last year at AALL although the Speakers List changed drastically! The designated moderator, Arthur Miller, was unable to attend, and Jean O'Grady, who performed yeoman's duty throughout the Conference, filled in more than adequately for Sandra Gold. Nevertheless, in time-honored PLL tradition, the show did go on in impressive PLL style.

Kingsley Martin, who happens to have the same initials as the not-

quite-passé buzzword of "Knowledge Management," has proven himself to be the "King of KM." In his customary insightful presentation style, KM explained the transition firms are making from using technology as an internal tool to making significant expenditures/investments in technology to "assist with revenue-producing knowledge systems." These systems should be available externally to clients and reflect the increasingly Matter-centric nature of law firm services. From internal use of technology to the external use of knowledge and the evolution of teams, Kingsley illustrated how the paradigm has indeed shifted. He also provided a much-needed definition of a "portal": "a fully integrated workspace with the capacity to access ALL the electronic assets of the firm."

Jean O'Grady followed KM with an insightful review of sources of support for a firm's KM project, including the supplement to the June issue of *The American Lawyer*, entitled "Leftovers," and Richard Siskin's book, *Transforming Law*. She cited a good way to justify portal/intranet expenses by taking 10% of the non-billable time of the firm that can be saved, at a minimum, by the implementation of the project. (That figure may well be a very conservative one, if the project is implemented enterprise-wide.) Jean identified the evolution of "Research Librarians," to becoming actual "Developers" of practice-specific tools for the future, rather than performing the reactive role of searchers.

Since it is well-nigh impossible to predict the constantly-shifting landscape of law firm terrain, Jean recommends hiring and mentoring a set of people who are able to deliver a product in response to ever-changing needs, rather than creating static positions based on existing skills. Building more directly on Kingsley's presentation, Dennis Hauptley's comments touched on the increasing emphasis on the "Matter-centric" nature of the firm practice and discussed more specifics of the evolution of the use of technology within the firm.

The PLL Luncheon featured the dynamic, hip-swiveling Timothy Green of the Ernst & Young Center for Business Knowledge. He gave an entertaining (to say the least!) presentation on "Reinventing Your Library" that I don't think we'll forget for a long time. Tim

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PLL PERSPECTIVES DEADLINES

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

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A THOMSON COMPANY

FROM THE CHAIR

by Patricia Keller, Kirkpatrick & Lockhart LLP, Washington, DC

Hello to all Private Law Librarians and welcome to a new year! I'm sorry that I missed all of you at the Annual Conference. I really wanted to be there!

I will briefly explain why I was unable to travel by making a long story short. I have been living with a slow-growing brain tumor for 10 years now. It has been followed carefully by MRI tests every six months. As bad luck would have it, I broke through my seizure medication and was having seizure problems a few weeks before I was to travel. On the day I was to leave for Minneapolis, I learned that the tumor had grown and there was now swelling on the opposite side of the brain. Doctors being probably overly cautious, I was told not to travel, put on a high dosage of steroids to reduce the swelling and scheduled for surgery on August 10. We are, of course, hoping that the results of the surgery indicate that the tumor is still a low grade, slow growing tumor. If not, there will be further discussion about treatment. I will be at home for at least two weeks after surgery to recuperate.

Enough of me, and on to those who made the convention a success. I would like to thank Ann Jeter, who has been a great help to me this year and who gave us a very good PLL year. I would also like to thank Kamla Hedges from the Bureau of National Affairs, who stepped in for me at the PLL lunch and introduced the speaker. I would also like to thank BNA for their generous sponsorship of the PLL lunch. I would like to thank our luncheon speaker, Timothy Green from Ernst & Young, for his generous time. My dear friend Nancy Ciliberti stepped up to the plate, and covered for me, probably better than I could have done myself.

I want to thank the current board members and congratulate the new PLL Board members, Janeen Heath, vice-chair/chair-elect, Janet McKinney, treasurer, and Howard Trivers, executive committee member.

I also want to thank all of you who have volunteered for Committee Chairs and volunteered to work on Committees. Now for the rest of you:

For those of you who have not yet decided what you would like to do for PLL this year, I would like to make some suggestions. Perhaps you feel hesitant to take on more responsibility due to the pressures of work and family. I can understand that, however, there are things you can do which do not require major expenditures of your time.

Perhaps you don't know where to start. One good place to start is to look at the PLL Web site on the AALL Web page. There you will find the names of the Board Members and Committees.

It is important that each and every PLL member volunteer for something to be a part of the organization. You don't want someone else to make decisions for you. You want to be a decision-maker within the organization. Here are some suggestions:

A. Join with a friend and volunteer for a committee

Most committee work does not take a significant amount of time. You not only get exposure to how PLL works for its members, but also get the satisfaction that you made a difference for PLL. To volunteer for a committee, call the committee chair. Committees and chairs are listed on the PLL Web page at www.aall.org/sis/pllsis.

B. Run for office

You may want to run for a Board Member position to start, although all of the offices are very necessary. If you want to run for office, call the nominations chair and offer your name.

C. Develop a program for the convention

Call the education committee for help or with an idea for a program. It is important that PLL is well-represented at all annual meetings.

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pinpointed the same challenges Kingsley Martin stated that firms are facing: Mergers, Global Expansion, Competition, Effective Use of Teamwork and Technology to save on expenses and to increase productivity. His major message was clearly: CHANGE IS OPPORTUNITY and Tim illustrated this theme with a review of developments in his own Center and the emphasis on VISIBILITY.

It is vital to 'Get Visual and Auditory' in this sound-bite society, as Tim demonstrated so well, in order to identify specific needs and to align the resources to fill them. The E&Y Research Team has used everything from videos to bookmarks to catchy research pages on intranets for the purposes of grabbing attention and responding to demonstrated research needs. The Library and Research Centers house new identities for the staff, including "Change Agents, Complexity Managers, Intellectual Property Saviors, Miracle Workers, Professional Organizers, and Diplomats!" Although an effective "Librarian" has no doubt been all of those for decades, the current challenging environment provides the opportunity to highlight those existing skills.

A quick visit to the Exhibits for an initial tour was squeezed in before proceeding to the next session, "Technology Crystal Ball." Bob McConnell, veteran tech guru from LEXIS, shared insights about the latest projects, and the impact of various tech trends through the years. The personalization of portals, changes in the technical architecture, applications that publish Web services, and "computers that disappear from view," using 'blue-tooth technology,' were some of his points for discussion. Bob reminded us throughout his presentation that there are frequently major disruptions in the development of technology that tend to "send the developers back to school," as predictions and assumptions evaporate in the face of reality, and usage does not meet expectations.

Cary Griffith, longtime expert writer and consultant, continued that theme as he discussed the much slower-than-anticipated acceptance of the e-Book and problems with various Web services, including his own in Minnesota. Despite the difficulties with trying to predict the effects of past technologies, Cary affirmed the significance of Application Service Providers, Web robots, voice recognition, and PDAs in the near future. He cited a Control Data study, which concluded that what was done 20 years ago by a staff of library professionals, is now performed by one paraprofessional and LEXIS trackers. The profession will continue to feel major pressure from the changes in technology and increased competition from other automated research sources that promise to deliver information more cost-effectively. As Cary sees it, the long-term future of the librarian's role may well be in doubt.

The final "official" meeting of the day was entitled, "The Incredible Shrinking Library." Kate Kennedy of Squire, Sanders & Dempsey in Cleveland, and Beth Langton of Buckingham, Doolittle & Burroughs in Akron, gave a well-coordinated presentation of their all-too-familiar experiences in downsizing their physical collections. Their challenges included the ever-present misperceptions about availability

and cost of research materials and the struggle to balance library needs with physical limitations. Firms are growing, and libraries are shrinking – at what cost to staffing and response? Beth and Kate did a great job of presenting the blow-by-blow, power-play-by-power-play evolution of the plans for reducing the physical plant. The re-organization of both the physical library space and acquisition of online resources mirrors the changes occurring in firm structure and management as practice groups re-align and prepare themselves for the competition.

Sunday night's gala offering of the LEXIS-NEXIS-sponsored Opening Reception honored two of Minnesota's natives with a cast of comic characters from the work of Charles Schulz and yet another beloved cast of characters from "The Wizard of Oz," in honor of Judy Garland. Fabulous food and a chance to meet and greet colleagues and friends topped off a long but rewarding day.

The big decision on Monday morning was where to have breakfast? We opted for the BNA booth featuring Starbuck's coffee and various calorie-laden offerings to sweeten the short presentation given by the editor of their "Court Decisions" in their erudite publications. Other options were the gourmet goodies at the LEXIS-NEXIS Cyber Café and the newspapers, leather couches, and fresh coffee and accompaniments at the Westlaw Lodge. To be fair, we patronized them all at some point during the conference.

After spending time playing the giveaway games in the Exhibit Hall, we joined other conscientious types in the presentation on Copyright. The session discussed the evolution of the Copyright Clearance Center's policies and Web site, and ways in which firms are handling this complex issue in light of technological changes and challenges. Two firm librarians reviewed their internal procedures and described how they decided on totally different responses to the CCC challenge. One viewed joining the Center as "litigation insurance," while the other worked closely with vendors to implement the appropriate circulation procedures to forestall any potential problems. Both agreed that increased education and awareness is vital in the law firm setting, citing the need for warnings on intranets as yet another way to instill awareness in the end users. An interesting side discussion was about the use of listservs to 'borrow' issues of newsletters and other publications, rather than contacting the publisher directly or joining the Center to ensure compliance. Maybe we're not living up to our roles as "intellectual property saviors," as we should!

Following an extremely entertaining and welcoming AALL Luncheon, we visited the Exhibit Hall again and attended various vendor demos throughout the afternoon. For many of us, the evening's entertainment consisted of a private performance by garrulous Garrison (formerly known as "Gary") Keillor and the Guy's All Star Shoe Band at Concert Hall, followed by an outdoor picnic on the Plaza with musical accompaniment. He made a great effort to tailor his remarks to the audience, and most of the audience found it an enjoyable evening. One colleague who had never heard "Prairie

Home Companion” or any other Keillor shows commented on how much he sang, rather than spoke during the performance. But those of us in-the-know are familiar with how much music is presented and popularized, by his longtime show.

Tuesday morning got off to a rousing start with “Cutting-Edge KM: Law Firm and Librarian Experiences on the Edge.” Susan Siebers volunteered up front that her discussion focused more on problems than solutions, and that as far as she knew, no one in the major Chicago firms had completed a KM project successfully. In her firm, they got off to a rousing start. The managing partner committed to backing the project, the decision was made that billable time was to be given to lawyers who contributed, a committee was formed from the administrative and lawyer groups, and a consultant was selected. He came on board and a basic strategy was designed, where selected lawyers and staff were to be nominated from each practice group, and following a general interest meeting, interviews with the 19 designated teams were scheduled. However, at this key point, the consultant withdrew from the legal market and the project ‘died.’

Nina Platt, of Faegre & Benson, gave her usual low-key but effective project overview of her firm’s initiatives. She reminded everyone to incorporate such ‘low-tech’ initiatives as corporate bibles, practice group meetings, e-mails soliciting information and referrals, and training, as good starting points for the in-house knowledge repository. Higher-level sources used at F&B include litigation support databases, marketing databases, the document management system, the help-desk database, conflict information, and Human Resources databases. Nina pointed out that a key to her success with the project was based on the close teamwork of everyone in the firm, whose practice is focused on specific specialties. An enterprise-wide effort in a much larger firm with widespread practices would be immensely cumbersome to handle. Kelly Ray from PricewaterhouseCoopers gave her input as a practicing attorney using an in-house KM system and made some valuable assessments of what worked and what was ineffective.

After missing a “time management” seminar due to a lack of effective time management, we revisited the exhibits as we made sure we made those final contacts. In the afternoon, a presentation on “Perfect Partners: Teaming Up with Marketing” featured several vignettes about working with the client relations department on a client proposal. Among the non-LEXIS and Westlaw resources used were the Web site for the Society for Competitive Intelligence, vault.com, AssociationCentral.com, and Hoovers. Presented in what seemed like ‘real-time’ (i.e., very little!), the library’s research team came up with a winning proposal for everyone. Use of a real-life entity, See’s Candies of Southern California, made it easy to follow and understand the strategies employed. Tuesday was one night off for most of us, to shop, sightsee, or explore yet another Minneapolis ‘hot-spot’ in more ways than one! (The temperatures never seemed to dip below 85.)

The final day on Wednesday saw no letup in the heat or the

relevant and interesting programs. At the early hour of 8:45, many of us showed up to enjoy “Two to Tango: The Following Part of Leading in Library Partnerships,” featuring Jean O’Grady, Steven Hinckley, and Robert Vecchio, in addition to a dynamic duo of ballroom dance partners, Paul Botes and Donna Edelstein. Surprisingly it was not much of a stretch from Vecchio’s discussion of the science of effective “followship,” Hinckley’s advocating of the equal importance of followship and leadership, and O’Grady’s illustration of the interplay between assertive and supportive staff and responsive and encouraging leaders to the demonstration of the delicate balance of partnering in dance. It all really flowed! We were only disappointed we had to vacate the room for the next session.

After a false start, a few of us ducked out to the elegant Minneapolis Institute of Arts to enjoy the Degas Collectors’ exhibit and the spectacular view of the city’s skyline before returning for the grand finale of the programs. This was “New Realities: Forward Thinkers Will Point the Way,” starring two of our favorite “forward thinkers” and a noted addition to the roster. Consultant Dick Boss led the way with his observations on the technological changes which have most drastically impacted the profession. He also reinforced the ideas that firms and corporations have moved from using technology to handle data to using it to manipulate information to developing problem-specific intelligence (expert systems). For the next steps, technology is being asked to amass enterprise-wide knowledge in preparation for the final stage of creating that knowledge utopia known as “wisdom.”

Professor, soon to be SLA Executive Director, Roberta Shaffer, impressed us with her Power of P’s – 7 of them, to be exact, as well as her rejection of PowerPoint! Her predictions included the importance of privacy, property, personalization, preservation, protection, propriety, and “pretty good” validity, which unfortunately is becoming the standard for the level of quality of research. Bob Berring wound up the session with his usual rousing exhortation, in his inimitable way. His first conference was in Minneapolis in 1974, and he found remarkable similarities in the programs of the 2001 Meeting. The emphasis then, as now, is on “people skills,” the drastic changes in the physical aspects of libraries (space is smaller, although coverage is larger), managing staff (“Preventing Stress and Burn-out”), and the positive aspects of a profession which one can enjoy as one learns and “shares the wealth of knowledge” to which we are privy. According to Bob, the “Knowledge Utopia” is already here, in the library!

As we made our way to the lively final reception and banquet that evening, I reviewed the meeting and was glad to have made the effort to attend. I found ALL of the meetings, contacts, and events, to be worthwhile. Kathie Sullivan and her crew did a fantastic job, elevating the level of programs to new heights. I felt reinvigorated, rewarded, and recognized by peers, validating my day-to-day efforts in the profession. I couldn’t have asked for more.

AMERICAN ASSOCIATION OF LAW LIBRARIES PRIVATE LAW LIBRARIES SPECIAL INTEREST SECTION EXECUTIVE BOARD MEETING JULY 14, 2001

by Jeanne Korman, PLL Secretary; Weil, Gotshal & Manges, LLP, Miami, FL

The Executive Board Meeting was called to order by President Ann Jeter at 4:10 p.m.

In attendance were Ann Jeter, Lauri Flynn, Terry Psarras, Janeen Heath, Kathie Sullivan, Jeanne Korman, Monica Wilson, Joanne Dugan, Jan Brown, and Howard Trivers.

Old Business: Minutes of the last meeting were accepted as written.

New Business: President Ann Jeter announced that Pat Keller, incoming President, would be unable to attend this year's conference due to health problems. Ann also announced that Scientific World, a new division sponsor, contributed toward the cost of the Business Meeting breakfast by providing \$5.00 per breakfast attendee. BNA is paying the full cost of the PLL luncheon. A fee was charged for the luncheon to encourage members to attend. Ann discussed AALL's proposal to create divisions within the organization by type of library. If the proposal passes, PLL would then become a division of AALL. It was the sense of the Board that Ann should relay the Board's opposition to this change in the structure of AALL. Since Pat Keller will not be able to conduct the Wednesday Board, rather than conducting a full-blown Board meeting, the Wednesday meeting will focus on the strategic plan with Martha Goldman.

Treasurer's Report: The Division's healthy treasury prompted discussion of additional ways to use SIS money. Interest was expressed in funding grants for registration at Professional Development programs. Kathie Sullivan moved to accept the Treasurer's report as is; and in light of the acceptance, move that the Board direct the Grants Committee to investigate the awarding of grants to attend a regional Professional Development program. Joanne Dugan seconded. The motion passed unanimously.

PLL-Perspectives: Jan Brown reported that three issues were produced this year. The first theme issue for *Perspectives*, an issue on intellectual property, was published this year and became issues two and three of *Perspectives*. Jan discussed the current

arrangements for the production of the newsletter, including the terms of West Group's support, the printer in Fremont, Ohio, and the various problems which have arisen with delays and miscommunications. Advertising revenue was down due to one free ad per issue requested by West, a new request, and due to the production of three instead of four issues.

A discussion of the pros and cons of Web publication of the newsletter followed. The advisory committee will discuss this type of dissemination at its upcoming meeting. Consideration should be given to lost advertising revenue when considering the move from print to electronic access. Also to be considered is the attitude of vendor support if there is no advertising in the newsletter.

Jan reported that the committee worked well together this year and was more effective.

Standards & Guidelines Committee: Al Podboy, chair of the committee, made a formal request that the committee be changed to a task force. He felt there was no interest among the members of the SIS in establishing standards and guidelines. Subsequent discussion of the bylaws regarding who has the power to disband a committee led to a motion by Kathie Sullivan. Kathie moved that the Bylaws Committee examine Article VII of the bylaws regarding committees and report to the Executive Board. The motion was seconded and unanimously approved.

Bylaws: No report.

Issues surrounding the conduct of the last SIS election led to tasks, which should become committee charges, being assigned to the Bylaws Committee. The committee needs to review the archives regarding Article IV of the bylaws. The committee needs to review all of Article IV and also bring procedures in the manual into compliance.

The meeting was adjourned at 5:40.

TRAINING ATTORNEYS: HOW TO GET THEM TO ATTEND TRAINING SESSIONS AND COME BACK FOR MORE

by Ronda Fisch; Reed Smith, LLP, Pittsburgh, PA

Judging by the number of librarians who attended this program, developing successful training programs that attorneys will attend is a challenge many of us face. This panel program was moderated by Ronda Fisch and included Rachel Jones, an active PLL member involved in her firm's training programs, and Peg Fuller Corneille, Director of the Minnesota State Board of Law Examiners.

The program lasted one hour, and in that time the panel provided an overview of attorney training as it exists in most firms today and discussed reasons why these training programs are insufficient. While there are many ways to successfully market training programs, this program focused only on using CLE credits as an incentive to get attorneys to attend. A detailed explanation of the accreditation and reporting procedures was presented which included recordkeeping, costs and criteria for approval.

One of the most important points made in this program was that you need to have the commitment of your firm's management in order for your programs to be taken seriously. It was suggested that librarians build on already established programs by collaborating with attorney presenters. In order to establish credibility, librarians might need to begin by sharing a program with someone who has

already successfully presented a program to a practice group. Training is not just a one-time deal; librarians can assist in the before and after training process by providing bibliographies and by following up with the attendees.

This program was limited to CLE, but based on the program evaluations, many librarians are already creating training programs but are in need of creative ways to increase attendance. Food and prizes are a start, and marketing the program to the targeted group is imperative. Gaining group head or departmental support is also vital. However, in a law firm environment, any program that reduces the attorney's billable time will be resisted. You might be able to increase attendance by developing core competencies for attorneys in each practice area and offering programs that build on these core values.

The librarian who is ready to expand his/her role in their firm left this program with many ideas. If you have examples of ways to get attorneys to attend training and even come back for more, please contact Ronda Fisch (mail to: rfisch@reedsmith.com) or Rachel Jones (jonesr@dsmo.com).

NEWS FROM THE INDEPENDENT LAW LIBRARIANS GROUP

by Ruth Balkin, Balkin Library & Information Services, Rochester, NY

This is my last column as the chair of the Independents for 2000-2001. Wanda Barrett, of Special Library Service, Inc., is the incoming chair. Our biggest accomplishment the past year was the creation of an electronic mailing list. (Many thanks to Cassidy Cataloguing Services).

We hope this list will grow in the future. To subscribe, send an email to listserv@cassidy.com, leave the subject line blank; and put one line in the body of message: subscribe pllill-l "your name."

We will have an online directory available shortly. Joni Cassidy has gathered information on who we are and what we do to update the list. Contact her if you want to be listed and haven't heard from her. Our directory should be accessible from PLL's site. The address is <http://www.thecatalog.org/ill>.

Our program this year was co-sponsored with the PLL Intellectual

Property Group. Dr. Roberta (Bobby) Brody, Queens College, School of Library & Info Science, gave a wonderful workshop on "Ethics in Corporate and Competitive Intelligence." Joni Cassidy and Luci Curci-Gonzalez did a wonderful job of putting together the program. Sponsors of the program included Dialog, EOSi and Cassidy Cataloguing Services (sorry if I have missed anyone).

Volunteers are needed to write articles for *PLL Perspectives*, help with next year's programming, directories, and other tasks. Contact Wanda at wanda@everlove.com.

Finally, I would like to thank the group and especially Joni Cassidy and Joan Axelroth for their support and assistance over the last two years. I was totally surprised and thrilled to receive a Certificate of Excellence and the lovely gift. It has been great serving as chair, but it is time for me to move on and let others get leadership experience.

AMERICAN ASSOCIATION OF LAW LIBRARIES PRIVATE LAW LIBRARIES SPECIAL INTEREST SECTION EXECUTIVE BOARD MEETING JULY 18, 2001

by Jeanne Korman, PLL Secretary; Weil, Gotshal & Manges, LLP, Miami, FL

Past President Ann Jeter called the meeting to order at 7:20 a.m.

In attendance: Ann Jeter, Janet McKinney, Howard Trivers, Jeanne Korman, Janeen Heath, Carla Evans, Martha Goldman, Maya Norris
Toolkit Update: Maya Norris, of AALL headquarters staff, was in attendance for an update on the toolkit revision. Janeen Heath, a member of the Toolkit Revision Committee, provided the update. All of the toolkit pieces have been converted to Web-readable format and most have been updated. The format is presently Word but the toolkit pieces will eventually be in PDF format. The present plan is to send all PLL members a marketing handbook; a 16-20-page printed document, which is still in the development stages. This document will refer recipients to the Web for the other pieces of the toolkit. Ann would prefer that AALL produce this rather than Lexis. The topics within the toolkit are Law Libraries in the Information Age, a Bibliography; Developing Mission Statements; Commonly Asked Questions on the Work of Law Librarians.

Strategic Plan: The Board reviewed the goals of the current strategic plan. The Board decided that the inclusion of the AALL core competencies in the PLL strategic plan was not necessary. Programming will promote the core competencies and these core competencies can also be used with the Association of Legal Administrators programming.

After reviewing the goals of the current strategic plan, the Board made several decisions. Marketing the tool kit, #1, is completed; and #2, Consumers and Publishers, is no longer necessary; Research into the value of law librarians, #3, ties into the toolkit and core competencies. RIPLL, #4, is deleted. This is meant to be a best practices initiative. Target employers, #5, should target employers to promote the value of law librarians (This is 1C2 of the AALL

strategic plan). The Board added the following to the plan: (1) Market law librarians to other legal associations. Activities to support this initiative include distributing core competencies at ALA, having a booth at ALA, spreading core competencies around, participating in ABA Law Practice Management section and participating in a LegalTech show (there are 3-4 of this type of show). Other additions include the needs to (2) promote law librarians as key players in knowledge management, (3) share best practices of expertise, (3) expand participation by members in PLL. Discussion ensued regarding how to do this and how to convince employers to allow this participation. The Board discussed how to get new volunteers. Suggestions included contacting chapter presidents for names, contacting new members by e-mail or letter to encourage volunteerism, sending an e-mail asking for volunteers before the beginning of the new year; and sending certificates of appreciation to committees chairs and committee members. Further ideas included sending thank-you letters to employers, with a cc to committee member, program chair, or speaker, and sending a letter with the ballot asking member if he/she would be willing to serve on a committee or in an office. Be sure that language will motivate members to participate. Other additions to the strategic plan were to (4) expand Professional Development program locations and (5) work with SLA.

Grants: The Grants Committee will be charged with finding more ways of expanding grant opportunities; perhaps grants to attend library school could be provided as well as travel grants. The meeting was adjourned at 8:40 a.m.

AMERICAN ASSOCIATION OF LAW LIBRARIES PRIVATE LAW LIBRARIES SPECIAL INTEREST SECTION BUSINESS MEETING JULY 15, 2001

by Jeanne Korman, PLL Secretary; Weil, Gotshal & Manges, LLP, Miami, FL

The 2001 Annual Business Meeting was called to order by President Ann Jeter at 7:30 a.m.

Ann recognized Scientific World as a sponsor of the meeting. Introductions of the Executive Board then followed. BNA was thanked for sponsoring the SIS Luncheon and West Group for sponsoring the Leadership Reception.

Secretary's Report: The minutes from last year's meetings were approved as submitted. Jeanne Korman reported that 438 votes were cast in the election; 3 votes were invalid and there was one write-in vote.

Treasurer's Report: Lauri Flynn reported that as of May 30 there were 2,046 members of the PLL SIS, which continues to be the largest SIS. There is currently \$20,887.48 in the SIS treasury.

COMMITTEE REPORTS

ALA Liaison: Ann Jeter presented the report. Good progress has been made in working with ALA. The PLL participated in the 2001 program planning meeting with Mary Forman representing the SIS. The suggested program was accepted and Tom Duggan planned for the 2002 meeting from suggestions by Mary Forman. The SIS was represented at a booth at the Baltimore ALA conference. Pat Keller, incoming president, attended the conference and staffed the booth. Pat felt the display materials were out-of-date and tired looking. Suggestions were made to spiff up the display.

Nominating Committee: No report.

Education Committee: No report.

Grants Committee: Stephanie Paup reported that four travel grants were awarded. This year the travel grants became available to those who had already received a grant, as well as first-time applicants. The application is now available on the Web site. Stephanie thanked Global Securities for its generous donation toward the travel grants. Marguerite Bull was introduced as incoming chair of the committee.

Mentoring: No report.

Newsletter: Jan Brown thanked West and Leshner Printers for their contributions toward the newsletter. The first theme issue of *Perspectives* was presented this year. Jan ended her report by asking for contributors.

Public Relations: The committee was charged with completing revision of the membership brochure, and it did succeed in completing the charge, reported Lucy Gonzalez. Work will continue on the revision next year.

Strategic Planning: Martha Goldman reported that the committee has begun a review of the recently expired strategic plan (1997-2000). Carla Evans will be working with her as co-chair. The committee is borrowing heavily from the AALL strategic plan. The original plan had six initiatives, but there are currently four initiatives of interest to the committee (task force to envision the future, core competencies, active promotion of law librarianship, high quality libraries). New goals must be created.

Webmaster: No report.

Toolkit Revision: Michael St. Onge, chair of the committee, reported the biggest problem encountered by the committee was sorting out the confusion between the PLL Toolkit and the AALL Resource Guides. There will be a more specific focus on private law librarians in firms of all sizes. Lexis has provided a grant to publish the toolkit; however, a large portion of this will appear on the Web site. Another change is that the Public Relations committee will be used to market the toolkit.

ABA Liaison: Hazel Johnson, liaison for four years, reported that she is working with the Law Practice Management section of the ABA. The section is currently going through the same role definition problems we are experiencing, and it is grappling with the question of whether it needs to be a section. A visionary meeting that Hazel attended was held in Chicago during the winter. Many ideas came out of the meeting, but how many will be implemented remains to be seen. Michelle Schmidt, Morrison & Foerster in San Diego, will be the incoming contact.

GROUP & CAUCUS REPORTS

Ann Jeter noted that caucuses don't have specific charges but exist for networking purposes.

Independents: Joni Cassidy reported for Ruth Balkin. Wanda Barrett will be the incoming chair. The group will be presenting a program in St. Petersburg. Dr. Roberta Brady will speak at the workshop-style program, "Ethics in Corporate and Competitive Intelligence." A Web site for the group has been set up this year and is currently being hosted by Cassidy Cataloguing. An independents, online directory has also been put together. After the information contained therein is checked, the directory will be posted. The independents would like to have a link to the independents' Web site placed on the PLL Web site.

Corporate: No report.

Continued on Page 12

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TECHKNOWLEDGE: EAGAN, MINNESOTA JULY 12-13, 2000

by Elizabeth LeDoux; Presta, Gates & Ellis, Seattle, WA

West hosted its very first TechKnowledge Institute in July in Eagan, MN. Anne Ellis put together an incredible program, inviting 31 firm librarians from all over the United States. She very carefully picked an excellent cross section of law firm size (from 23 to 1030) and librarian experience (from very experienced, sophisticated librarians to very new ones). West hosted us in Eagan right before the AALL Annual Convention. This ended up being terrible timing for everyone involved, but we couldn't know that until we got there. West was very busy getting ready for the convention; and by the time the participants arrived at the Minneapolis Convention Center, most of us were exhausted.

Anne Ellis teamed up with Mary Lynn Rice-Lively and the University of Texas Library School (UT GSLIS). Mary Lynn brought a wonderful freshness to TechKnowledge, with a curriculum and focus none of us could have anticipated. Anne Ellis put together a great team of tech people from West who shared a lot of their experience with us. Of course they also shared a lot of new West products as well.

For me there were several highlights. First, I had the chance to meet dozens of wonderful librarians. The collegial, sharing, intelligent bunch was a joy, and I really enjoyed working with them and sharing ideas all around. We also made several after-hours trips to the Mall of America, which was great fun as well.

Second, John Hokkanen, currently the knowledge manager for Latham & Watkins in Austin and a professor at UT GSLIS, was an extraordinary speaker. He gave a great presentation about librarians and technology, pointing out that the reason technology projects often fail is that there is little buy-in from the most senior

management. He pointed out that as librarians we need to get into the lunchroom, into the practice group meetings and into the hearts of our attorneys, including them early in the planning processes for new projects. The more they know and understand, the more they will support what we are doing.

The last highlight was seeing what Linda Will, director of research at Greenberg Traurig, was up to. She runs her library like a business. If she partners with another department (like IS), investing time and money into resources and for some reason the department lets her down (by not supporting the technology or by never getting around to installing it after agreeing to), she charges back the cost from her budget to theirs. She seemed to have a hundred ideas going at once, and to see her intranet page was a treat. She maintains a database of all attorney and staff user ID's and passwords running on a cold fusion database (don't ask me, I just heard of it last week!). She runs WestClip on hundreds of clients and topics. Her attorneys can access these articles from Westlaw using transparent authenticity, keeping them up-to-date. She subscribes to dozens of electronic newsletters, and they are available to everyone who needs them. She has made Am Jur, ALR, cases and statutes available via Westlaw, again with transparent authentication for all of the offices that do not have librarians or library collections. She seems to be working on the library of the immediate future.

There was lots of talk about what the future brings. I cannot really tell what it is, but surely it will be wireless and global; and someone has to get in there to organize the information. Why not us?

AMERICAN ASSOCIATION OF LAW LIBRARIES PRIVATE LAW LIBRARIES SPECIAL INTEREST SECTION BUSINESS MEETING *Continued from page 10*

Solo: No report.

Multi-Tasking: Quarterly columns have been written for PLL *Perspectives* reported Lee Nemchek. BNA will be distributing the directory at its exhibit hall space. An article was published in *Law Library Journal* this year. Lee will be speaking at the ABA meeting on document retention and management of client files. The culmination of this year's activities will be the Business Meeting on Monday where program ideas for Orlando will be discussed and submitted.

Technical Services: The group will be meeting on Tuesday at 5:15 to discuss the listserv and long-range planning. The focus will be on the effectiveness of communication with those not in technical services.

Multi-Location Library Caucus: The group was formed five years ago and has been leaderless for the past few years. There will be a meeting today from 5:30 – 6:00 in Director's Row 3 of the Hilton. There has been some interest expressed this year.

New Business: Ann Jeter reported that the luncheon program has been changed a little this year to enable a more in-depth presentation by the speaker. The luncheon will run from 11:45 until 1:00. Tim Green will speak about "Redefining the Law Library." Mark Estes announced that staff ratios for law libraries have appeared recently on the ALA discussion list and that the information is inaccurate. Clerical staff is being counted as professional.

President Ann Jeter adjourned the meeting at 8:30 a.m.

TIME MANAGEMENT

by Mary Mahoney, Peterson, Johnson & Murray SC, Menomonee Falls, WI

As a PLL travel grant recipient, I agreed to write about a session I attended at the recent AALL Annual Meeting. Agreeing to write was the easy part – deciding what to write was not so easy. I enjoyed so many aspects of the meeting. I chose to write about the session that I knew I needed the most – TIME MANAGEMENT.

“Time Management – There Really ARE Enough Hours in the Day!” was presented to a packed room on Tuesday morning. Looking at all the competing seminars, I was impressed that this one could draw such a crowd – until I realized that I was not the only one who needs to manage their time! I was in great company. Looking around the room, I recognized several faces from different types of libraries and with varied levels of experience. There were new librarians as well as people who have been involved in law librarianship for decades. Could time management be a universal issue? Wow, I felt better already, and the speaker had not even been introduced.

Prioritizing was the message. Anything is possible if you prioritize. Schedule what you can and yet be flexible enough to deal with the unexpected emergencies. My work life and home life seem to always need the flexibility, and prioritizing is not easy. The speaker and several guests agreed that having a personal organizer was the key. It could be a Palm pilot, as the person next to me had; it could be on the computer calendar at home and office, or it could even be a regular, paper-type organizer. I had never used one, so I thought maybe that would be the key. I would probably lose a Palm pilot to other family members; I can rarely get to my computer at home due to family competition for it, so paper was the way.

I should set goals. OK, now I know she was speaking to me directly! I seem to have only one goal – get as much of my work done today as possible, so tomorrow I can get as much done as possible. I never seem to get ahead – I’m always working! GOALS – that’s

the answer. When do I have time to set those goals? No answer to that question. Maybe in the shower in the morning. Is that part of prioritizing? I’m still working on that.

It was an energizing session, and I left knowing I would better manage my work and home life. I’d even have time on my hands for organizing and volunteering. I immediately bought a personal organizer. I removed it from its box and carry it with me daily. I must confess that I haven’t found time yet to put the addresses and telephone numbers I need into it, so I continue to carry my address book. I have not yet consolidated my family and work calendars into the several pages with the book, so calendars for each sit on my desks. I have not yet listed the daily or even weekly tasks I should perform. I have great intentions of doing it – I just can’t find the time yet.

Because I was writing this article, and sitting for 20 minutes while my daughter saw her orthodontist today, I did write in her next appointment on the calendar of my new organizer. I’m on my way to time management! I am again rejuvenated and excited about managing and finding all those hours in a day! Maybe next year, I’ll write an article for the newsletter and actually submit it within two months of the meeting! See you in Florida.

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AALL'S LEADERSHIP ROUNDTABLES - A CHAPTER PRESIDENT'S PERSPECTIVE

by Ann Clifford Green

Sonnenschein Nath & Rosenthal, Washington, D.C.

Within the AALL Annual Conference, there are many “subconferences,” invitations to parties, reunions for “Bender babies” and TRIPPL/AMPLL/TRIALL/TRICALL alumni receptions. Of course, there are numerous SIS and Committee meetings. And there are a host of early morning and late afternoon meetings throughout the entire conference. What are those librarians doing sneaking out of their hotel rooms at 6:45 a.m., coffee cups in hand? Should YOU join them? In this article, I am going to share some of my experiences at these meetings – AALL’s Chapter Leadership Roundtables.

Chapter leaders are invited to participate in the Chapter Leadership Roundtable Discussions, which focus on issues of interest to chapters. Roundtables are led by AALL leaders and AALL staff members. These sessions also provide opportunities for chapter leaders to share information with each other and to learn of chapter success and failure stories. Topics for Roundtables this year included professional development, government relations, meeting management, membership development, public relations, and chapter newsletter and treasurer training. All Leadership Roundtables are open to all chapter members, except for the sessions involving treasurers and newsletter editors. Ideally, each chapter will have at least one representative at each session. At many of the sessions, AALL’s Strategic Plan was referenced. The plan is especially useful in planning educational meetings for chapters and for chapter marketing, for example.

Susan P. Siebers, director of Library & Information Services at Katten Muchin Zavis, led the Chapter Training session on meetings and parliamentary procedure on July 17, 2001. Susan ran a great meeting, starting exactly on time; and she strongly advised the rest of us to do the same in our own chapter meetings. She talked about the importance of an agenda and how chapter leaders can approve an agenda. Each informational item on the agenda does not have to be discussed individually if the agenda is approved as a whole. Therefore, you can speed up your meeting. She spoke on the seven steps in handling a motion, and we did some role playing with this. Her “basic order of business” and sample board agenda from a CALL meeting are excellent models to follow when running a chapter meeting.

Sue Burch, Sally Holterhoff and Carol Bredemeyer led the Chapter Leadership Roundtable on public relations on July 16, 2001. Their focus was on promoting your chapter by using the

AALL Strategic Plan. One excellent example of this uses Strategic Direction #2, Outcome B, to get chapters involved with students at local schools of library and information science. Ideas included starting a letter-writing campaign to deans/directors of the schools, offering to teach a law librarianship class (or other classes) and dropping off snacks and goodies during finals from the chapter/law library. The speakers also gave excellent suggestions for ways that chapters can create good public relations, such as writing columns or articles in legal newspapers or bar journals, hosting joint meetings with other library associations, having a table at AALL and bar association meetings, and participating in career days at area high schools. Past issues of AALL Spectrum and Chapter Leadership Bulletins were distributed, each with several good articles on the topics of marketing and public relations.

Chapter presidents and vice presidents attended a program on July 14, 2001, by the AALL Professional Development Committee on “Planning and Hosting Successful Programs for Your Chapter: A How-To Guide.” While technically not a Roundtable, this program was so well done that I have to mention it here. If these guidelines and sample spreadsheets are followed, a chapter can find out whether a program makes ends meet and whether to host such a program in the future. Whether or not to use vendor sponsorship was discussed among the chapter leaders in the room and most, but not all, used vendor sponsors for at least some of the chapter meetings and events.

In conclusion, what I found in Minneapolis was a renewed sense of camaraderie and some chapter management ideas to bring home to LLSDC. I honestly learned more from many of these Leadership Roundtables than I did from the larger programs. It may be the small size of the rooms, or the shared fatigue of attending a 7 a.m. meeting, but the networking with small groups was very beneficial.

I would like to thank AALL, and most especially the PLL for awarding me one of the PLL travel grants. I also applaud the Professional Development Committee for their hard work, and the AALL Executive Board for showing us how to use the AALL Strategic Plan in our daily professional and association lives. Thinking ahead to Orlando, I encourage you to apply for the AALL and PLL grants and to attend a Leadership Roundtable. You will be glad you did.

PLL Treasurer's Report

by Lauri Flynn, PLL Treasurer, Littler, Medelson, San Francisco, CA

PLL Income & Expense		
10/1/2000 – 7/31/2001		
INCOME		
Beginning Balance 10/1/00	\$23,206.23
Advertising.....	\$3,000.00	
Contributions	\$4,000.00	
Dues – SIS.....	0	
Miscellaneous Revenue	0	
Sales – Occasional Papers.....	0	
Registrations	0	
Royalties	0	
Miscellaneous Sales	0	
Newsletter Subscriptions.....	0	
Workshop Registrations	0	
Total Income.....	\$7,000.00	
EXPENSE		
Meeting Rooms/Audio-Visual	0	
Exhibit Expense	0	
Food & Beverage	0	
Awards	\$300.00	
Honoraria	\$100.00	
Miscellaneous Expense.....	\$47.60	
Supplies.....	0	
Postage/Freight.....	\$47.59	
Election Expenses	\$1,061.88	
Printing.....	\$46.33	
Brochures	0	
Newsletter Expenses	\$7,715.35	
Souvenirs/Giveaways.....	0	
Telephone	0	
Transportation	0	
Total Expenses	\$9,318.75	
Excess Income Over Expense	\$-2,318.75	
Ending Balance	\$20,887.48	

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