

PLL PERSPECTIVES

THE QUARTERLY OF THE PRIVATE LAW LIBRARIES SIS OF THE AMERICAN ASSOCIATION OF LAW LIBRARIES Volume 14 Issue 1

FALL 2002

GETTING A DOSE OF VITAMIN 'C' AT THE AALL CONFERENCE

by Linda Jean Schneider
Drinker Biddle & Reath LLP
Philadelphia, PA

"Creating the Connections" was a very appropriate theme not only for the AALL Meeting this year, but also for those of us seeking to benefit from a re-examination of the other "Big C's" prevalent in our profession today: Contracts, Copyright Compliance, Communities of praCtiCe (the ubiquitous KM topic), Cost reCoveRY, and Coordination of Co-Workers in the increasingly-demanding legal environment. The major difficulty was Choosing from the available selections, while fitting in sufficient time for surveying exhibits, participating in focus and user groups, and networking with Colleagues from near and far. Naturally, Orlando's Orange County Convention Center was an excellent location for imbibing Vitamin C, whether in Orange Juice or a Daiquiri!

The first session of the well-attended PLL programs, "Performance Management: Making the Connection Between You and Your Staff," Challenged the attendees to re-think the very basics of personnel management. Retention 'Evangelist' Bob Rosner urged the audience to apply his Credo of Revealing Information/Energizing your Staff/ (using a variety of) Tools (to)/Invest in your staff/Now. RETAIN! He reviewed the changing dynamics of the current work environment, as well as of the legal profession. Rosner's "12 Steps to Better Bossing" feature exacting "Dos and Don'ts," that resonate with the need to face the challenges head-on, and to make plans for effective staff development. He emphasizes the need to vary leadership styles in response to divergent personality styles and to prevent stagnation.

Rosner continued his "Retention Evangelization" at the PLL Luncheon, and provided more of his insights into "The Working Wounded." More information on his presentations and publications is available at www.retentionevangelist.com or www.workingwounded.com, which won a Forbes.com Best of the Web Favorite award.

In a tightly-focussed afternoon session, Linda Will and William Kwiatkowski analyzed the all-too-frequent hectic and demanding scenarios occurring behind the scenes as law firms contemplate major Changes and Challenges in "Law Firm Mergers: A Roadmap Through the Minefield." The two speakers were former Colleagues, so they were able to build on each other's Comments, due to their familiarity with their

respective interests and strengths. Bill delved into the "Theory of the Growth/Merger Process," while Linda discussed the specific Contributions of the Library Staff during the transition phase.

The first 'Point of Attack' for most firms is to identify and understand the strategic needs of the firm, which are not necessarily "growth for growth's sake," appearances to the contrary. The objectives may be to add specific practice groups or target acknowledged experts in specific sub-practices. Although it may seem arbitrary, frequently the geographic expansion may come about as a result of client proximity, rather than any aspirations toward Empire Building. The next step is that of evaluation and due diligence as a Merger Committee determines the financials and the possible client synergy that could result. As the Powers that Be calculate what they call a "Pro Forma," the whole must equal MORE than the sum of its parts in order for it to work. The Implementation Phase, or integration of firm Cultures, wherein it is hoped that most of the initial expectations are met, can take a very long time, and this Cooperation is key to the survival of the merger.

Linda Will spoke of the need for immediate action on the part of the Library/Research Department as soon as the decision to merge has been finalized. An almost instantaneous needs assessment must take place, where the user population is surveyed. Any resulting staffing changes should be handled promptly and professionally. Her statement that current AALL standards recommend 10 Staff members for every 190 attorneys drew admiring gasps from much of the audience. And Ms. Will states an effective case for that ratio. She makes a major distinction between those who manage the Machines (IT) and the Scholarship (Library/Research) of the firm. Linda offered a Laundry List of focus points during the transition. These include staffing, print Collection, possible pricing options for acquisitions, on-line resources training and password management, Copyright Concerns, growth, Care and Feeding of the Catalog, and the needs for Consonance and Continuity with regard to the budget stated in the Pro Forma, while Complying with the new Costs and procedures. Lots of ammunition for this daunting Challenge!

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PLL PERSPECTIVES DEADLINES

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

West Group is proud to support the AALL-PLL by laying out its quarterly newsletter, *PLL Perspectives*.

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FROM THE CHAIR

by Janeen Heath
Munsch Hardt Kophorr & Dinan,
Dallas, TX

Well, here we are. Another class of summer associates has come and gone; we've had another Annual Meeting under sunny skies; vacations are over; fall associates are arriving and your new PLL/SIS chair steps up to the plate. My goal is to hit a home run this year, but a base hit or two is fine just as long as I don't foul out. This from a person who is not even a member of the baseball SIS but has been hearing way too much about the threatened Major League baseball strike

Vice Chair Holly Riccio and I came up with a slogan for PLL this year. "The Rock-n-Roll is back in PLL!" Of course this idea came to us the night of the West Group reception at the Hard Rock, and we were being photographed with feather boas and guitars while surrounded by gold records. Not only do we want to get that "Energizer Bunny" of years past back into action, but we are also hoping to create a following of PLL "Groupies" who are willing to do anything to be a part of our entourage. Mind you, in our definition of "groupies" we mean volunteers to PLL who share our vision.

PLL recently lost an opportunity to have 3 private law librarians on the AALL Executive Board, including the office of President. This would have been a chance to have a representative at the top, one who shares and understands the goals of the private law librarian. We blew it. This is not saying anything negative about Janice Johnston or the other Executive Board members. I truly believe that they will work hard and fairly represent private law librarians. However, I am concerned that even as private law firm and corporate librarians make up the largest part of the membership of AALL, we are lacking in representation at the highest levels. Out of 80-something AALL Presidents over the years, only six have come from private law firms. Of 38 AALL committees, a mere four are chaired by private law librarians.

There are nearly 2000 of us in AALL, so why are we not seeing greater numbers of private law librarians in leadership positions? Even more significant, when we are given the opportunity to be represented by one of our own, why do we not support the candidates who understand our world the best? Are we not paying attention to the elections? Are we voting based on name recognition (or a lack thereof)? Are we voting at all?

Those who take a risk and stick out their necks to accept the call to lead should be supported. These librarians have days in their offices that are just as hectic as yours. They have spouses, significant others, kids and pets just like you. Still, they make the extra effort to offer something back to their colleagues. Those folks are rare and very precious to the vitality of our group. Without those risk-takers out in front and charging ahead, PLL would be without vision or direction. A SIS without leaders is just a group of people joining together for no special purpose. And without a purpose, what is the point in forming the group? It is in our best interest to do everything we can to encourage and assist those who would lead us. This is how our voice is heard.

I have heard some comments that people have offered to volunteer and either were not chosen or were never even contacted. Let me assure you that if you have any desire at all to volunteer for PLL in any way and for any amount of time and effort you can afford, I will do my best to accommodate you. SIS Chairs tend to choose those people we know or those who make their desires known to us. And you have to contact someone at PLL. AALL does not forward interested volunteers to us, so we need to hear from you directly. It is well worth it because not only are you giving the rest of us the benefit of your knowledge, but you also receive so much by expanding your network of contacts throughout the country. I chaired the CRIV committee several years ago, and to this day I can call any of those great people if I have a question about their state's law, have to get a form or statute fast, or even need to find legal experts in fields not covered by our firm or our state. That ability to draw on resources from across the US and provide my attorneys with hard to get information really impresses them and furthers their support of my professional activities. I bet it would do the same for you.

I look forward to a great year as your Chair. Please do not hesitate to contact any of the executive board members or me if there is anything we can do to make your membership in this SIS better and more productive. We want you to know that your voice is just as important as anyone else's, and I look forward to adding you to my expanding network of great librarians.

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The activities for Sunday afternoon and evening ranged from Plenary Session I with Keynote Speaker Michael L. Ray, whose specialty is Creativity, Focus Groups, and Committee Meetings, to the eagerly-awaited Opening Reception at Sea World with Shamu, and lots of good food and dancing!

Breakfast on Monday morning in the Exhibit Hall provided a prime opportunity to examine new products, Compete in Contests, and acquire a range of much-needed office toys and trinkets from the major and minor legal publishers. The morning revved up with the second Plenary Session, featuring Ron Zemke, who acknowledges that Changes and Challenges abound in everything from life expectancy to drastic adjustments in lifestyle and technology, and offered his insights into dealing with them. As attributed to Darwin, "It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to Change."

The first major dilemma of the Conference was the difficult Choice between the "Pull" of "The Power of Patent Research" versus the Call of "To ReCover or not to ReCover." The C's won again as an extensive session on the process of law firm Cost ReCOVERY (a/k/a 'realization') provided invaluable insight into different pricing and charging policies and options. As in almost any meeting involving a variety of operations, it was apparent that every firm has its own approach to the problem of Cost ReCOVERY. And as with most meetings, it was still helpful to hear others, propelling self-examination on the part of most attendees. As an example, a Sample PowerInvoice was distributed to the audience, and there was discussion about policies such as not charging for something that is normally on a library shelf when you pull it online. Some firms do so; others do not.

This discussion focussed on the difficult task of identifying the best tactics for different types of firms. The speakers examined the "Model" of the Online Research Billing Cycle (Research Session → Invoice → Client Billing → Client Payment → Questions → Research), and the need to develop a firmwide strategy with support from the top. As the speaker pointed out, there are compelling reasons for the Librarian to take Charge of this process:

- To redefine the role of the Librarian in the administrative hierarchy by taking responsibility for this task.
- To improve the Librarian's relationship with Management.
- To position the Librarian as an 'Integral Part of the Team.'
- To demonstrate the Librarian's "Core and Specialized Competencies," as specified by AALL.

Patterns of use on LEXIS and WESTLAW can be monitored using their respective accounting software (PowerInvoice or QuickView) in order to enumerate usage by practice group, by attorney, or by billable v. nonbillable usage. One of the audience recommendations was to track Internet and CD-ROM usage with software such as Research

Agent or the Carpe Diem Tracker function, to monitor usage and to justify the need for each service. The speakers recommended "leveraging what is learned" from these analyses by

- Keeping it visual for presentation to management.
- Demonstrating the bottom line impact.
- Developing a firm-wide strategy.
- Quantifying the opportunity.
- Communicating from the top down.

At the festive and colorful Association luncheon, Keynote Speaker Catherine Crier discussed the issues and fascinating career path that motivated her to attempt her current position as Host of the Legal News Show, "Crier Today." And after another stop in the Exhibit Hall for more prizes, we faced another decision point. Unfortunately, a Commitment to attend a User Group Meeting conflicted with another good dose of Vitamin C in "New Connections in Copyright Law." The Main Speaker, R. Anthony Reese, proposes using part of the existing Copyright law to solve fair use Challenges involving the transmission of Copyrighted works over Computer networks. (Citation: 2001 U. Ill.L.Rev. 83; online as a PDF file at <http://www.utexas.edu/law/faculty/treese/Illinois.pdf>.) When in doubt, buy the tape! So I did.

Several Vendor parties, including the always lively and entertaining West Party held at the Hard Rock Café, topped off the long day.

Following either an enjoyable Vendor Breakfast or a spirited AALL Committee Meeting, depending upon your schedule, many of us Chose to attend Plenary Session III on Tuesday morning. Keynote Speaker, Eric Miller, expounded on the notable projects being pursued at the W3C (a/k/a "World Wide Web Consortium"), for which he serves as the 'Activity Lead.' Miller discussed the W3C initiatives in the development of RDF (Resource Description Framework) that allows sharing of information without re-building databases for the formation of the Semantic Web. He then strongly encouraged the audience to "assert (your) expertise in the physical world in the electronic world" as well. Miller sees a great need to make explicit in the electronic world what is already implicit in libraries, and this project is part of that effort. This was an awesome, mind-expanding speech that advocated the predominance of library skills and knowledge in the electronic world. The sponsor, BNA, Inc., Chose well!

The next session, Cultivating Communities of PraCtiCe: Key to a Knowledge Strategy," actually built directly on some of the ConCepts Miller espoused. Speaker Etienne Wenger, an Independent Consultant from Canada, gave an excellent presentation on the evolution of Communities of PraCtiCe, which range from families and classes to associations with particular interests in common. Unlike the models that build teams around a specific task and are project-oriented, these Knowledge

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Communities share common interests and/or goals that allow for the evolution of a supporting structure. Their organization and development provide fascinating case studies, directly correlating to practice groups in law firms or library associations. With audio and video enhancements as well as direct audience Contributions, Wenger brought home many of the characteristics and potential of Communities of PraCtiCe.

A final tour of the Exhibit Hall was Certainly warranted and led to yet another excellent session. This one, on Vendor Contract Compliance was entitled “Connecting with Law Publishers by a Licensing Agreement? What am I Supposed to Do?” All three speakers, Julie Bozell of Greenberg Traurig, Lisa Smith-Butler of Nova Southeastern University, and Kermit Lowery of LEXIS-NEXIS, shared Coherent, Cohesive, and inCredibly helpful observations regarding Digital Licensing. Julie presented a Comprehensive ‘New Purchase Licensing CheCklist,’ that designates specifics on format, Content, Copyright, support, training, evaluation, and pricing options. Lisa Smith-Butler offered her advice from the academic arena, analyzing the vast differences between the process in which libraries acquired ownership of materials in print and how they are now acquiring **access** to the same materials through digital licensing. In addition to her step-by-step discussion, Lisa also provided an extensive bibliography on the topic. Julie elaborated on the licensing Checklist, and recommended that the “Key to your licensing success is asking the

right questions.” From the vendor perspective, Kermit offered that a license is needed both to protect the data and to adhere to government regulations. There is a need to balance the need for information as opposed to privacy concerns. Although there are not many places in the license he identified as ‘negotiable,’ Kermit suggested that the vendors would most likely be willing to amend the appropriations clause and the ‘place to sue’ clause.

I Contemplated having yet another dose of Vitamin C at the program: “Connections with Technology: the First Amendment and Copyright,” but had reached the limits of my attention span, as well as my dosages. So once again – I bought the tape! And the evening was spent gathering strength for the final day of meetings and activities.

I had selected two Compelling Courses to wrap up my schedule for the week: “Information Overload!” and “Take Back your Time: How to Regain Control of Work, Information, and Technology.” Hmm – there’s a theme here somewhere! I viewed these sessions as a way to re-tool myself to return to the firm, and make the most of my time and effort, and vitamin C. No doubt about it – Mary Ellen Bates is a guru when it comes to touting the skills and knowledge of librarians and finding ways to make effective use of technology to streamline the information influx. She advises trying to develop “mental content filters,” to distinguish between what is Critical and what is transitory. Mary Ellen recommends fostering the same development in patrons where possible, by teaching ‘information evaluation skills’ to them.

Her presentation dovetailed nicely with that of the speaker at the next program, Jan Jasper. As the Office Efficiency Spokesperson for IKON Office Solutions, Ms. Jasper is Constantly looking for ways to streamline her clients’ lives. In addition to using software tools available on your desktop to Conquer Clutter, she discussed ways to handle interruptions, to ‘turn your e-mail box into a To-do List,’ and to transform your Calendar into a “planning tool, rather than just a place to record daily minutiae.” Her pithy comments and specific examples were no less than inspirational!

A field trip to the lovely Morse Museum with its extraordinary Tiffany Glass Collection in Winter Park provided a Cultural breath of fresh air in the afternoon. And that evening, we enjoyed the Closing Banquet, where we Connected with Colleagues and Convened to Celebrate our Profession one more time.

1/4 Page Advertisement

WORKING WOUNDED

Speaker: Bob Rosner

by Joni L. Cassidy

Cassidy Cataloging Services, Inc.

Harrison, NJ

Bob Rosner is Chair and Shop Steward of WorkingWounded.com. He writes the internationally syndicated column, "Working Wounded" and is the author of *The Bosses Complete Survival Guide* (McGrawHill) and *Working Wounded: Advice That Adds Insight to Injury* (Warner).

He's been called "Dilbert with a solution" because he puts his finger hilariously on the myriad irritations and problems that plague everyone at work on a daily basis – even if we love our jobs. And on the solution part because he doesn't just 'catalog' our complaints but offers concrete, field-tested strategies that yield results.

At AALL in Orlando on July 21, 2002 he spoke at the PLL luncheon on Better Bossing. The following are some highlights:

- It's not about whining about wounds . . . but rising above them.
- Employees need "digestible" information – maximize employees' ability to digest information you want to give them.
- What is your best time of day? Evaluate the time of day that you are at a peak; clear-headed, not tired, or hungry etc., and use THAT

time to communicate with your employees. If you are not a morning person, clearly that would not be a good time to handle situations among employees or problems that arose the day before. You will get better responses if you are in a more relaxed mental frame.

- Studies show that most bossing is done during the 15 minutes before you get in to your car at the end of the day, i.e., "Sally, can you get these papers off to Mr. So and so . . .", "Did you call the xx agency about those figures, Janet?", "We'll be having the such and such meeting tomorrow at 10:30am. Sally, can you get that memo out tonight to the staff?" And so it goes that many bosses hide behind their doors and on the way out they issue their barks and commands. Finding your good time of day and communicating with your staff then yields better results.
- A dead battery cannot charge a dead battery! You cannot expect innovative and motivated employees if you yourself are not like that. Take the lead in being motivated.

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Half Hz Page Advertisement

TURN & FACE THE STRANGE CHANGES: CREATING CONNECTIONS WITH YOUR STAFF

by Stephanie Fox Pierson, Esq.

LeBoeuf, Lamb, Greene, & MacRae, L.L.P., Newark, NJ

It's happened to all of us at one time or another in our careers. Whether you're a library director responsible for a vast number of offices worldwide or a solo librarian with a part-time loose-leaf filing clerk, something happens to the team – a promotion, a cutback, an extended leave of absence, a new boss – and the delicate balance you've been struggling to maintain is destroyed. You're then faced with that most terrifying of all human experiences – CHANGE.

According to Sandra Yancey, President and Principal Consultant for Yancey Consulting Group, Founder/CEO of eWomenNetwork, Inc. and presenter at AALL's program "Teaming Up: Connecting with Your Staff," change does not have to be a mind-numbing experience if we handle it properly. During her session, Ms. Yancey informed the audience that adapting to change is one of the key elements of a high-performance team. But, she explained, it is actually the transition, and not the change itself, that does us in. Ms. Yancey outlined the three phases of transition – Endings, Neutral Zones and New Beginnings. In the Endings phase, we must recognize that the hardest part of change is letting go of the way things were done in the past. In order to transform from one strategy to another, we must say goodbye to our old methods before we can embrace the new ones.

Once we've allowed our team to go through the ending process, we need to advance to the Neutral Zone phase. This is where you take everyone out of autopilot and get the team heading toward the new goal. By way of example, Ms. Yancey asked the audience to write their names on a piece of paper as many times as possible in 10 seconds. She then asked people to switch hands and repeat the exercise. A random sampling of audience members revealed that no one was able to write his or her name with the new hand more than half the number of times they did with their dominant hand. Ms. Yancey explained that when implementing change, we must go into it knowing full well that the team will not be as fast or as efficient immediately as it was previously. Not only must we, the leaders, understand this but the concept also needs to be shared with the team members. As Ms. Yancey put it, pretending that this phenomenon isn't occurring, putting all the "rah rah" around it and expecting it not to happen, only creates frustration and anger. Only after the group is out of autopilot and has bid farewell to the ways of old, knowing that high performance will take time and patience, can it truly move forward and enter the New Beginnings phase of transition.

Change should also be managed during the formation stage of a team. In order for a team to get to the point where it is actually accomplishing something, the members must form awareness of the team and its place within the organization. The team must first

understand its purpose. Why does the team exist? Who are its key constituents? What does one person bring to the team that another does not? Who are the team's friends? and Who are the team's enemies? If everyone on the team can answer these questions, they can begin to work together toward a common goal.

Next, the team members need to appreciate their roles and responsibilities especially in relation to other team members. Ms. Yancey refers to this as identifying each member's "sandbox." Once the team members identify their "sandbox," an understanding is formed: "No one else is allowed into my sandbox without first being invited or asking for permission." This understanding helps to avoid the natural conflicts that arise within a team when roles, functions and responsibilities are not well defined.

The third step of forming awareness is determining the processes of the team – the "how" to fulfilling the team's roles and responsibilities. The team then finalizes its formation through interpersonal relationships. This is the ability to appreciate other team members because each member trusts the others' knowledge and values what the others contribute to the team.

Fear is one of the main obstacles to successful transition and change. Ms. Yancey advised that a group could get over its fear by identifying its SPOTS – Strengths, Problems, Opportunities and Threats. Once it identifies its top three strengths (those things the team can brag about), its top three problems (those things that keep getting in the team's way), its top two opportunities (those things the team should be doing to achieve its purpose but are not) and its number one threat (the thing that could potentially "kill" the team), the team then has something to plan for and focus on. It is especially important to focus on the team's strengths since these are the positives of the group and reinforce what the group is good at. Always focusing on what the team is doing wrong is the surest way to halt its progress.

Toward the end of the program, Ms. Yancey suggested that one of the most important lessons of life is learning that it is not all about you. Ultimately, every organization is just trying to survive, and it is implementing changes in order to do so. The organization is not intentionally trying to ruin your day by initiating a new strategy or raising the requirements for your team. To emphasize this point, Ms. Yancey gave each member of the audience a Q-tip and told the group that QTIP stands for "Quit Taking It Personally." Once we grasp the concept that change is about the organization, and not about making any one individual miserable, we can begin to embrace the new ways and become a productive team.

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Full Page Advertisement

American Association of Law Libraries
Private Law Libraries Special Interest Section

EXECUTIVE BOARD MEETING

July 20, 2002

by Jeanne Korman, PLL-SIS Secretary
Weil, Gotshall & Manges, Miami, FL

In Attendance: Pat Keller, Holly Riccio, Monica Wilson, Howard Trivers, Jeanne Korman, Janeen Heath, Janet McKinney, Phil Rosenthal.

Call to Order: Chair Pat Keller called the meeting to order at 4:15 PM.

Minutes: 2001 minutes were approved as read.

Treasurer's Report: There are currently 1,542 members of PLL. Membership is down as membership was well over 2,046 last year. Eleven travel grants were awarded totaling more than \$2,700. Thus far eight of the eleven grants have been paid out. The written report was reviewed individually by the Board. The treasurer's report was seconded and approved.

Committee Reports: The committee reports are on the Internet Committee headings.

Grants Committee: The grants committee fell apart this year. The award of a grant for seminar tuition was not done, but it should be done next year.

Mentoring Committee: The committee would like to disband as they feel most of the work is done with the AALL mentoring committee. CONELL was given a grant by the PLL mentoring committee. Janeen Heath noted that information is difficult to obtain from CONELL, and that only three private law librarians attended. She would like more experienced librarians to reach out to new people and did not feel the committee should be disbanded.

Program Committee: The committee is doing well. Janeen will attend the Monday morning meeting of the committee

Strategic Plan: Martha Goldman will continue to work on this. Janeen plans to divide the strategic plan among groups.

Public Relations Committee: The committee is charged with finding ways to get things published in non-law librarian publications, such as *Law Practice Management*. A writing contest was discussed. Submissions could not have been previously published.

Perspectives: *Perspectives* will only be in electronic format in the future. Advertising will be stripped when issues are placed on the website. Jan Brown would like to get away from editing *Perspectives*. Any names of interested people to take on the task of editor should be passed along to Jan or Janeen.

Toolkit: The committee is trying to complete getting out the Resource Guides. These were the basis of the toolkit. The toolkit is at a point where the marketing handbook should be developed. The public relations committee is supposed to be developing a brochure and will also be responsible for marketing the toolkit.

Old Business: Discussion of the election and proper procedures for its conduct ensued. Pat Keller noted that she instructed the secretary to conduct the election by mail ballot because it was a contested election.

Janeen Heath reported on the PLL booth at the Association of Legal Administrators conference in San Antonio. Two gift baskets containing salsa, chips, pralines, etc. were given away. There was a good amount of feedback from the attendees. She placed the core competencies document out as a giveaway. More giveaways are needed for next year. There were no volunteers to man the booth so Janeen did it herself. A thank you must be extended to Janeen's firm for providing the interior of the booth, chair, table, etc.

The need for thank you notes to sponsors was discussed, and the incoming secretary was assigned the task of preparing a draft for Janeen's review of standard thank you notes for 1. sponsors (Lori Hedstrom of West; Judy Floyd-Evans of Lexis) 2. committee chairs and members and 3. employers. Certificates should be prepared for committee chairs and the Executive Board. The certificates would be presented at the breakfast meeting next year. The thank you notes for this year should be sent by September 1, if possible.

The meeting was adjourned at 6:00 PM.

American Association of Law Libraries
Private Law Libraries Special Interest Section
ANNUAL BUSINESS MEETING

July 21, 2002

by Jeanne Korman, PLL-SIS Secretary
Weil, Gotshall & Manges, Miami, FL

Call to Order: Chair Pat Keller called the meeting to order at 7:15 AM.

Minutes: The 2001 minutes were read by the Secretary, Jeanne Korman.

Treasurer's Report: There is currently \$39,000 in the treasury. The report will appear in the next issue of *Perspectives*. As of May 31st PLL membership was 1,542. The report was seconded and approved.

Pat Keller recognized the representative from Lexis-Nexis and thanked Lexis for sponsoring the business meeting breakfast.

Toolkit: Michael Saint-Onge provided background for the toolkit project. The Resource Guides are sold by subscription. The Resource Guides are out. Be sure to use them. They will be incorporated into the toolkit. The toolkit should be complete by the end of the year. Lexis has contributed \$20,000 toward the project.

Future of Libraries: Nina Platt reported that an open meeting will be held in the Peabody where the results of this report will be presented.

Program Committee: Connie Dickson reported that the Program Committee review has been submitted to the Board. The committee report will be on the website.

Public Relations: Lucy Curci-Gonzalez reported that the committee did not meet its goals this year. She is looking for new members for the committee. She would like to redo the PLL brochure and come up with other marketing ideas.

ALA: Pat Keller reported on Janeen Heath's trip to San Antonio to man the PLL booth at the Association of Legal Administrator's conference. Janeen later gave a full report.

Independent Group: Ruth Balkin reported that the new PLL Independents Group Directory of Members and Specialists is online. There is a direct link from the PLL website to the directory site, which is sponsored by Cassidy Cataloging. Joni Cassidy asked anyone with a subject specialty who does freelance work to send her your name for inclusion in the directory.

Technical Services Group: Betty Roeske reported that the group will meet Tuesday at 5:30 in Peabody Plaza Ballroom H. The agenda will include Seattle presentations and utilities and how to protect data.

Records Management Group: Lee Nemcheck reported that activities focused on speaking and publishing. Lee and Bob Oaks were speakers at the SLA annual conference in Los Angeles. No PLL programs were accepted for the 2002 ALA conference.

Awards: Randall Thompson reported that eleven awards were made and 10 were accepted. The names of the recipients were read. \$2,500 is the normal limit of awards but a one-time waiver was granted which allowed \$3,343 to be awarded. The Executive Board asked the committee to expand the award to encompass other educational opportunities.

Perspectives: Questions were asked about the archiving of *Perspectives*, the length of time they will be archived, how far back are they currently archived, why are ads stripped. Washburn University hosts the AALL site and Washburn does not allow any advertising on its site.

Jan Brown was recognized for her work on *Perspectives*. She asked for volunteers for *Perspectives* and issued an appeal for writers.

New Chair: Pat Keller recognized Janeen Heath as the PLL chair. Janeen presented a gift to Ann Jeter as she departs from the executive board. Janeen reviewed ideas for the upcoming year.

Adjournment: Chair Heath adjourned the meeting at 8:17 AM.

Continued from Page 8

After beginning the session with the five reasons that teams fail (inability to get along, failure to adapt, succumbing to the "me only" syndrome, becoming frozen in fear and being unable to rebound), Ms. Yancey closed by outlining why teams win – they share information, they adapt to change, they ask about "we" and not "me," they understand "it takes teamwork to make the dream work," they don't get stuck in being scared, they try new things and they rebound. If we can implement the tips, tools and techniques offered by Ms. Yancey, each and every one of our groups can become a high performance team; and we each can successfully turn and face the strange changes of connecting with our staffs.

Full Page Advertisement

American Association of Law Libraries
Private Law Libraries Special Interest Section

MINUTES OF PLL 2002-2003 EXECUTIVE COMMITTEE MEETING

July 24, 2002, Orlando, FL

by Holly Riccio, PLL Vice-Chair

Davis Wright Tremaine, LLP, San Francisco, CA

Janeen Heath, Chair, called the meeting to order at 7:10 a.m.

In attendance: Howard Trivers, Janeen Heath, Holly Riccio, Janet McKinney, Terry Psarras, Terri Lawrence, Martha Goldman

Chair: Janeen announced that PLL is back on track and is a reenergized group. In an effort to build on this, Janeen thought the meeting would be best spent discussing our Strategic Plan and brainstorming to come up with ideas to incorporate into a reworked plan. Martha Goldman would assist us during the discussion to help work the ideas we come up with into Strategic Plan goals, objectives and actions.

GOALS:

1. To Promote the Value of the Law Librarians

a. Objective: Target Potential Employers

Action: Increase joint activities with Association of Legal Administrators (ALA).

Action: Get a table at American Bar Association and State Bar Association meetings.

Janeen reported on her experience attending the ALA Annual Meeting this year. The Vice Chair, Holly Riccio, will attend the meeting next year in San Diego, manning the PLL booth in the Exhibit Hall. The second action was discussed, and the Board thought it was not the best place to put our efforts. Other ideas that were discussed were getting a column in the *ABA Law Practice Management* publication (which we used to have, authored by Hazel Johnson), getting a table/booth at the ABA Law Practice Management meetings, and getting a program proposal in to (and accepted at) the ALA Annual Meeting.

b. Objective: Promote AALL Core Competencies Included in the Toolkit

Janeen will check with Michael Saint-Onge on this objective to see where the toolkit stands. She wants to see us promote the value of law librarianship outside of the PLL community.

c. Objective: Increase Marketing Possibilities

d. Objective: Promote Law Librarians as Key Players in Knowledge Management

Our PR Chair from last year, Lucy Curci-Gonzales, is continuing on this year as Chair and will work on these objectives.

e. Objective: Law Librarians Publish Articles in Publications Read by Our Employers

One of the ideas that came up to try to achieve this objective was to have a contest to provide AALL Annual Meeting registration costs (or

travel costs to/from the meeting) to the winner of an article writing contest. The winning article would then be submitted to non-librarian publications for inclusion, and the other articles could be published in future issues of *PLL Perspectives*.

f. Objective: Private Law Librarians Publish Articles in AALL *Spectrum*

This is a new objective that was added as a result of Board discussion. One idea on how to achieve this objective would be to contact vendors to identify editors to interview PLL member(s) and write the article. This was suggested because many PLL members don't have time to write an article but would have time to answer questions that could then be turned into an article.

2. To Share Expertise With Other Law Librarians

a. Objective: Get Revised Toolkit on the Web and Promote It to Members

The Toolkit is not currently on the PLL web site. Holly Riccio will talk to Michael Saint-Onge about the status of the Toolkit and work with Terry Psarras to get it on our web site. There was a discussion about whether the Toolkit should be made available to everyone or to PLL members only. Terry said that making it available for members only is a possibility, but it is a lot of work to do, according to Reggie Swanigan. The other question was whether the Toolkit has advertisements in it and whether that limits where we can put it. Terry stated that we can put it up on the web with the ads, but then it can't go through the Washburn server. Holly Riccio will check with Michael about whether there are ads in the Toolkit and report back to the Board.

Discussion then turned to *PLL Perspectives* and what the status of that publication is and will be in the near future. The last issue was mailed out in hard copy and also posted as a PDF e-mail attachment by Pat Keller. The Board decided to add the following goal:

2a. Determine Format and Delivery of *PLL Perspectives*

b. Objective: Sponsor a "Best Practices" Program at the AALL Annual Meeting for 2003

Janeen stated that there is a PLL-sponsored program in the works for the 2003 Annual Meeting called "Fun in the Stacks." The Board decided to take off "for 2003" on the objective and work on getting a program in each year.

After some more discussion, another idea came up that will be added as an objective to the Strategic Plan:

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Half V Page Advertisement

PLL-SIS TREASURER'S REPORT

10/1/2001 - 5/31/2002

by Janet McKinney, PLL Treasurer

Shook, Hardy & Bacon, LLP, Kansas City, MO

INCOME

Beginning Balance 10/1/01	\$47,401.80
Advertising	450.00
Contributions	6,000.00
Dues	0
Miscellaneous Revenue	0
Sales/Occasional Papers	0
Registrations	0
Royalties	0
Miscellaneous Sales	0
Newsletter Subscriptions	0
Workshop Registrations	0
Total Income	\$ 6,450.00

EXPENSES

Meeting Rooms/Audio-Visual	0
Exhibit Expense	\$ 3,000.00
Food & Beverage	0
Awards	2,738.48
Honoraria	0
Miscellaneous Expense	0
Supplies	481.31
Postage/Freight	506.38
Election Expenses	0
Printing	0
Brochures	0
Newsletter Expenses	8,035.03
Souvenirs/Giveaways	0
Telephone	0
Transportation	0
Total Expenses	14,761.20
Excess Income over Expenses	\$-8,311.20
ENDING BALANCE	\$39,090.60

Continued from Page 13

- c. Objective: Academic Law Librarian/Private Law Librarian Swap

Richard Leiter had written a letter to Janeen outlining his ideas for this last year. The Board will look into seeing how this might be accomplished.

- 3. To Develop and Maintain Contacts With Other Professional Associations
 - a. Objective: Have a Booth at ALA Annual Meeting Each Year
 - Action: Distribute Information About the Toolkit and Core Competencies

This objective has been accomplished. The Board decided that the focus should be on the other objectives under this goal:

- b. Objective: Partner with SLA Legal Division
- c. Objective: Partner with ABA Law Practice Management Section
- d. Objective: Secure Table at Legal Techshow Venues

The Board came up with two actions under Objective b – the first is to work with the PLL liaison to SLA (Ruth Balkin) and the SLA liaison to PLL (Phil Rosenthal), and the second is to cross publish articles in each association's newsletters. One of the ideas for cross publication was articles about programs at the SLA and AALL annual meetings. For Objective c, Janeen will work on finding someone to work with the ABA. The Board decided to eliminate Objective d and focus our efforts on the others.

- 4. To Encourage the PLL Membership to Become More Active in the SIS
 - a. Objective: Send Welcome Letter and E-Mail to New Members With Volunteer Opportunities Information and Sign-Up Form

The first action to achieve this objective is to get the list of new members from AALL Headquarters. Janeen also suggested following up with a personal phone call to new members, which would be a new objective under this goal.

- b. Objective: Send Volunteer Opportunities List/Information with Election Ballot

Holly stated that the Northern California Chapter (NOCALL) does this as part of their membership renewal forms. Holly will get a copy of their wording/format to Janeen and Elizabeth LeDoux (incoming PLL-SIS Secretary) and get this done before the next ballot goes out.

- c. Objective: Send Thank You Letters to All PLL Volunteers and Their Employers Every Year

Janeen is working on composing a standard letter to use for this, as well as collecting the names of the employers/bosses to send letters to (Action 1). Another thing the Board thought would be useful to include would be another letter/document outlining what PLL accomplished that year, to give the accompanying thank you letter to the employer/boss more meaning (Action 2).

- d. Objective: Monitor Active Members on the Local Level
- Action: Contact Chapter Chairs for Names of Persons Who Might Like to Get Involved at the SIS Level

Janeen stated that the PR Chair, Lucy Curci-Gonzales, would work on this.

- 5. To Expand the AALL Professional Development Program

- a. Objective: Offer Grants to Chapters to Bring PDC Programs to Their Locales

The AALL Strategic Plan had an objective in it to accomplish this as well. The PDC has gone through some changing in the past year, and Janeen thought the goal now was to get an understanding of where PLL fits into the picture now with the PDC and the AALL Strategic Plan. Martha suggested that this be a new objective.

- b. Objective: Have Grant Committee Reinstate Library School Scholarships for PLL Members

The Board discussed this idea and decided that it would be something that PLL could fund with some vendor matching/support. Holly will look into seeing what kinds of vendor support might be available for this. Other things that would be needed would be the development of an application form and criteria for reviewing the applications and selecting the winners. The PLL Grants Chair (Randy Thompson) will work on this.

- 6. To Increase Membership Diversity and Scope
 - a. Objective: Participate in Library School Career Days
 - b. Objective: Participate in Local Chapter Activities Directed at Newer Librarians
 - c. Objective: Promote Internship Opportunities
 - d. Objective: Encourage Mentoring in AALL

There was a brief discussion of these objectives, and they will be discussed among the Board during the year.

Janeen Heath adjourned the meeting at 8:30.

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Rosner brought our several other points: Most people bring only 3/5 of a human being to work . . . they leave behind humor, compassion, etc. If employees cannot bring these qualities they possess with them to work, they are not whole human beings. You want each of your staff members to perform at his or her full potential.

A question was raised: What do you do with the annoying, complaining employees? Answer: If they are not destructive or belligerent, let them be. People who 'stay inside the box' . . . the ones who are nice, who have to do 'the right thing' are not innovators! It's the annoying ones who are . . . they are the ones that get things done.

One side point was raised about dealing with other people: friends, employees, etc. 'Friends stab friends in the front' may sound strange, but think about it. If you just tell someone the problem you are having with him or what she is doing, instead of talking about her behind her back, you establish a better relationship by talking honestly with her.

Visit WorkingWounded.com to view past lectures, presentations and articles that Bob Rosner has authored. In his own amusing humor, he touches on the problems and situations that affect most of us in the workplace, whether we are employees or employers.

Rosner provided much food for thought!

REPORT OF THE TECHNICAL SERVICES ROUNDTABLE

by Betty Roeske

Katten Muchin Zavis Rosenman

Chicago, IL

The Private Law Librarians Technical Services Roundtable met on July 23, 2002, at the Peabody Hotel in Orlando. People attending had time to view the departure of the Peabody ducks for the night before attending this meeting. Our discussion centered on BookWhere. According to its press release, BookWhere allows the user to see the data exactly as the record creator had intended. The issue that concerned us is that the Universities that are in this registry had no knowledge that they were. We discussed the ethics of this situation.

Discussion centered on the information on their website:

The Resource Registry, launched in October 2001, is a database that indexes Z39.50 accessible resources. Changes made to the registry are immediately seen by BookWhere V4 users through the AutoSync feature.

One of our members had information from a BookWhere representative:

Since the release of BookWhere Version 4, Sea Change has built a registry of Z39.50 servers, called the Resource Registry. We use the information in the Resource Registry as the connection information within BookWhere Version 4.

We are encouraging each and every institution listed in the registry to take ownership of its Z39.50 connection information. In this way, they can add, modify or even remove their Z39.50 server from being accessed by our software. We have attempted to contact the hosts currently in our registry to encourage them to take ownership of their entries, but I cannot guarantee

that we have made contact with the proper people at each institution.

Brian Striman, Head of Technical Services & Professor of Law Library, University of Nebraska-Lincoln reported on their experience with BookWhere. They had no knowledge that their records were being accessed by BookWhere until they were informed by an AALL member. No one in their institution had any record that a BookWhere representative had contacted them. The situation is being addressed at Brian's institution.

After reviewing the topics of some of our previous meetings, it was decided to keep the focus of the meetings on a hot topic disclosed just before the convention. These topics have been the following:

- 1996: Job Descriptions and Job Responsibilities
- 1997: Coping with Vendor Change-Representatives from Matthew Bender, CCH and West Group
- 1998: Handling of disks and CDs that come with material
- 1999: Representatives from then LEXIS Publishing discussing branding and accounting issues
- 2000: Interest in a Technical Services Workshop
- 2001: Listserv issues
- 2002: BookWhere

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