

# PLL PERSPECTIVES

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

Volume 9 Issue 1

FALL 1997

## ELECTRONIC RETRIEVAL OF COURT DOCKETS AND DOCUMENTS

by Margareta S. Knauff  
Dickstein Shapiro Morin & Oshinsky  
Washington D.C.

**I**N THE BEGINNING THERE WAS PACER (Public Access to Court Electronic Records). PACER allows the user to dial into a United States District Court (USDC), United States Court of Appeals (USCA) or United States Bankruptcy Court (USBC) docketing system and retrieve copies of dockets. However, PACER is far from perfect. The term PACER can be misleading - it implies that the system is uniform, which is not the case. There are several different programs running, depending on which court you dial into. Even within the same program different courts have different versions, each with its own peculiarities. While there are similarities, each court has its system set up in a slightly different way. The bottom line is that while PACER is a useful tool for retrieving dockets, its lack of consistency keeps it from being user friendly.

### COURTLINK IMPROVES UPON PACER

After PACER came CourtLink, by Data West. Data West heard the complaints of PACER users about the difficulties of gaining access and keeping track of court phone numbers, as well as about its lack of user-friendliness, and developed CourtLink. CourtLink is a program which provides electronic access to court dockets of all PACER courts except the United States Courts of Appeals (that may change in the near future as CourtLink did not provide access to U.S. Bankruptcy Courts when it first debuted). CourtLink also provides access to Washington and Oregon state courts which is a logical step for Data West as a company based in Washington state. I hope to see more local courts added as Data West improves the product. CourtLink takes the headache out of using PACER: It worries about the changing phone numbers, which courts are undergoing upgrades and are not available, about the various modem speeds, the different login procedures and the different menus. The CourtLink user is provided with a consistent search interface for retrieving dockets. CourtLink can be set up so that users must enter a client ID number for billing purposes. Bills can be retrieved online and can be

broken down by user or by client ID for easy billing

While CourtLink does make it easier to search for dockets, it must work within the limitations of PACER. For the most part in the U.S. District Courts one can search for dockets only by party name or case number, as these are the only options the PACER program allows. CourtLink provides access only to dockets, not filings. To access CourtLink the user dials in and enters the search, then CourtLink dials the desired PACER court(s), performs the search and displays the results. Some PACER systems are set up to restrict the number of matches if one is searching by a common party name. For example, if one is searching for the party name "Brown," the user may receive a message stating, "Too many matches (45), please try again" instead of a list of all the parties named Brown. The same search on CourtLink will receive the same result. It is important to keep in mind that CourtLink works with PACER, it does not replace it entirely.

Of course, since CourtLink is providing improved access to PACER, it costs a little more. PACER currently costs \$.60 per minute and can be accessed via any communications program. Many of the courts now have toll free numbers (800 or 888), so in those cases there are no communications charges. For CourtLink however, you must purchase the program: \$49 per workstation for standalone, \$395 for network use at one location. After that one time fee, the cost is \$75.00 per hour connect time (\$1.25 per minute) plus a surcharge of \$.18 per minute for the time spent connected to a PACER court. The user is not assessed connect time charges for downloading billing information or upgrades. CourtLink does offer discounts for off-peak use. During weekends and after 6 p.m. your local time, connect time is discounted to \$60.00 per hour. The extra cost has been justified by the great benefits of CourtLink: It can be networked; it can be set up to force input of billing information; it provides interactive training via a CD-ROM and a well documented user guide; it can be *continued on page 4*

# PLL PERSPECTIVES

## EDITOR

Jan Brown  
Montgomery, McCracken, Walker & Rhoads, LLP  
Philadelphia, PA (215) 772-7611  
gbrown@mmwr.com

## ASSISTANT EDITOR

Gail Zwirner  
Hunton & Williams  
Richmond, VA, (804) 788-7268  
gzwirner@hunton.com

## ADVERTISING MANAGERS

John Davey Dechert, Price & Rhoads New York, NY (212) 698-3515 jdavey@dechert.com	Rachel Jones Dickstein, Shapiro, Morin & Oshinsky Washington, D.C. (202) 775-4777 jonesr@dsmo.com
--	--

## MARKETING MANAGER

Kathie J. Sullivan  
McNamee, Lochner, Titus and Williams  
Albany, NY (518) 426-4260  
mltwkjs@transit.appliedtheory.com

## CHAIR, NEWSLETTER ADVISORY COMMITTEE

Joan E. Jarosek  
Jones, Day Reavis & Pogue  
Dallas, TX (214) 969-4824  
jjarosek@jonesday.com

## DESKTOP PUBLISHER

Joseph Yacinski Design, Alexandria, VA (703) 683-3079

## PLL/SIS EXECUTIVE COMMITTEE

### CHAIR

Anne Ellis  
Holland & Hart, Denver, CO  
(303) 295-8096, aellis@hollandhart.com

### VICE-CHAIR

Glen Gustafson  
Sheppard, Mullin, Richter &  
Hampton, Los Angeles, CA  
(213) 620-1780, x4127  
ggustafson@smrh.com

### TREASURER

Claire Engel  
Nelson Mullins Riley & Scarborough  
Columbia, SC  
(803) 343-5536  
cae@nmrs.com

### PAST CHAIR

Michael Saint-Onge  
Coudert Brothers  
San Francisco, CA  
(415) 986-1300  
cbsfo@well.com

### COMMITTEE

Karl Gruben  
Vinson & Elkins  
Houston, TX  
(713) 758-1669  
kgruben@neosoft.com

### SECRETARY

Jean O'Grady  
Wilmer Cutler & Pickering  
Washington, D.C.  
(202) 663-6747  
jogrady@wilmer.com

Lori Weiss  
Shook Hardy & Bacon  
Kansas City, MO  
(816) 391-6548  
3431393@mcimail.com

PLL Perspectives (ISDN: 1068 9346) is published quarterly for distribution to members of the Private Law Libraries Special Interest Section of AALL. ©1997 PLL. All rights reserved. Reproduction in whole or in part without written permission is prohibited. Non-members may obtain single issues for \$10, or subscribe to the newsletter for \$35.00 per year. The PLL/SIS and the Editor do not assume responsibility for, nor endorse, the statements advanced by the contributors to or the advertisers in PLL Perspectives.

## FEATURES

- ELECTRONIC RETRIEVAL OF COURT DOCKETS AND DOCUMENTS 1  
*by Margareta S. Knauff*
- CD APPLICATIONS IN THE LIBRARY 5  
*by Wanda Gozdz*

## COLUMNS

- PLL'S PUBLIC RELATIONS COMMITTEE DOES ALA 1997! 8  
*by Barbara Cornwell Holt*
- INDEPENDENT LAW LIBRARIANS CAUCAUS COLUMN OFFICE TECHNOLOGY: HOW HAS LAW OFFICE TECHNOLOGY CHANGED 9  
*by Ruth G. Balkin*

## PLL NEWS

- FROM THE CHAIR 3  
*Anne V. Ellis*
- EDITOR'S INTRODUCTION 12  
*by Jan Brown*
- AALL AND LEXIS-NEXIS TO PUBLISH LAW FIRM LIBRARY RESOURCE GUIDES 12
- PLL STRATEGIC PLAN CALLS FOR CONSUMER ADVOCACY COMMITTEE 13  
*by Kathie J. Sullivan*
- AALL AND LPM—A RELATIONSHIP FOR THE FUTURE 14  
*by Hazel L. Johnson*

## FROM THE CHAIR

By: Anne V. Ellis  
Holland & Hart, Denver, CO

**T**HE PRIVATE LAW LIBRARIES SPECIAL INTEREST SECTION is now officially twenty years old. The PLL SIS is no longer in its infancy and only briefly out of its adolescence. Indeed, PLL is on the cusp of maturity. As a result of this new found maturity, PLL finds itself in a period of transition, much like its members. The demographics of the AALL survey on members indicates that most law librarians have been in the legal arena for approximately thirteen years. As a result of this experience, many of us have begun to look around and ask tough questions of our associations, ourselves and our employers. We realize that we need more in-depth, advanced educational programs with emphasis on technology, management and information products. And we need practical information and management skills for dealing with vendors. All of these concerns led the PLL Executive Board to undertake the writing of the PLL Strategic Plan in November 1996.

When the PLL Executive Board met in Dallas to write a PLL Strategic Plan, we began with creating a vision of PLL's future direction and, at the same time, envisioning goals that would support private law librarians in their work. The visions for PLL and its members speak to specific goals:

- Private law librarians will continue to be competent, viable, professional leaders within the private setting
- Employers will understand the complexity of the legal information environment and the value of law librarians
- Law librarians will be a powerful force in shaping publishers' products and services
- PLL members will be cutting-edge leaders of the profession within AALL and related organizations
- Law librarians will lead balanced and satisfying lives.

Now, the last of these visions may be the most difficult to achieve from an association's standpoint. But, ultimately, it is the crux of what we, as individuals, want to accomplish. Not only do we want respect for our professional knowledge, but we also want to achieve some balance in our lives. Now, I will admit that I have been way too absorbed in my work at times. In fact, in the middle of writing this column, I accepted a new and challenging job. But, that is the nature of our profession - to achieve profes-

sionally and to produce quality information for our lawyers and staff. And, as we all know, we are used to putting in long hours to achieve these goals.

What PLL is hoping to achieve with the Strategic Plan is a way to give our members practical support in managing libraries. The new Consumer Advocacy Committee is just such a vehicle as is the Research/Information for Private Law Librarians Committee. Both will provide hands-on products that will help us on a daily basis. And, we also want to prove and market our value as law librarians to our employers and clientele. The continuing marketing of the AALL Tool Kit, a research study on the value of law librarians and marketing to employers are three PLL Strategic Plan initiatives that will reach these goals. PLL has also responded to members' educational needs by proposing and presenting seven innovative programs in Baltimore in 1997. This trend will continue for Anaheim with PLL proposing programs which deal with knowledge management, admissibility of electronic evidence, records management, information audits and business information sources. I believe that PLL and its creative members have a strong voice in proposing and presenting quality programs.

So, what does all this mean in your life? Do you lead a balanced and satisfying life both within the profession and outside? I was fortunate enough to realize several years ago that I needed to "get a life." Now, my life is still as dedicated to law librarianship as ever. And, I know that I will still work hard at a new job and as Chair of PLL. But, I also am a convert to enjoying to the fullest the rarified air, vistas and sports that Colorado offers. Every time I ski down a snow-covered mountain slope, camp in the out of doors or just read a good book, I am thankful that I have finally discovered a fulfilling life away from work. That enjoyment translates into my becoming a more productive, enthusiastic librarian at my job.

So, after twenty years, PLL has grown up. I have been a librarian for almost twenty-two years now and feel fairly grown up also. But, both PLL and I are making fresh starts. PLL is making a new commitment to you with a Strategic Plan, more communication and more support. I hope that you, too, are as optimistic as I am that PLL can make a positive difference in your work world. If that is the case, then I believe that we can all begin to achieve that last vision of leading balanced and satisfying lives.

continued from page 1

searched by the end-user (e.g. attorneys or paralegals) freeing up library staff for other tasks.

### COURTLINK AND PACER AT DICKSTEIN SHAPIRO MORIN & OSHINSKY

How is CourtLink used at Dickstein Shapiro Morin & Oshinsky? The one feature we use again and again is the ability to search multiple courts at once. When, as often happens, attorneys do not know where the case they are interested in has been filed, we can search just one state or one circuit, or we can search the entire United States. Before CourtLink, a national court search was nearly impossible; and when asked to do it, we usually told the requester it would take three or four days. With CourtLink, it takes only about two hours. Another PACER feature we really like is the printing format for dockets. In some PACER courts it has been very nearly impossible to get the dockets to print neatly. CourtLink prints up a beautiful docket every time.

As fabulous as CourtLink is, it is not perfect. While the dockets print out beautifully, sometimes the process one must go through to get a docket to print is a nuisance. If one has done a name search (in either one court or many), one is presented with a pick list of cases. After you click on the case you want, CourtLink has to reconnect to the PACER court database to retrieve the docket. It displays the docket sheet as three or more tabbed sections. The first tab contains the party names, the second contains the case information, and the third contains the actual docket. You cannot simply hit print at the screen on which these tabs appear and expect to print out everything. CourtLink will only print those items you have viewed; so if you have not viewed the docket, it won't print it. It is simple enough to click on each tab to view each item, but there is a delay as one waits for the data to be transmitted (or processed - as it says on the screen). It would be a big improvement if this data could all be sent at once, allowing one to print the docket without actually having to view it.

So, does DSMO still use the PACER system? Yes, we do. It is still cheaper and faster if one is looking for a particular case in a particular court to dial into the one court, print the docket and go. It usually costs under \$2. A common complaint about the PACER service is that after a certain period of time if a court system is not accessed one loses one's ability to access it. What is not well known is that the PACER Service Center (PCS) has a program for libraries, which allows usage no matter how infrequently you access any court. If you call the PCS and tell them you are a library, you should be enrolled in the program (be persistent - some people at the PCS do not know that this program exists - don't let them tell you it doesn't). The individual PACER sites also contain items that cannot be obtained through CourtLink: A few have opinions, many have their local court rules. The access to the rules through PACER has been invaluable to me - it is the first place I check when asked to obtain a copy of the most current rules for a particular court.

### THE WORLD WIDE WEB IS THE FUTURE

As good as CourtLink is, I am here to tell you I have seen the future, and it is on the World Wide Web. The USBC for the Southern District of New York (SDNY)<sup>1</sup>, and the USDC<sup>2</sup> and USBC<sup>3</sup> for New Mexico have set up electronic access to case materials via a web site. The USBC SDNY is currently a pilot project involving electronic filings of court documents. However, one can retrieve full text dockets for selected cases. Also, one can retrieve the full text of filings in the various court cases. That's right - you can download a copy of the complaint from the Web! To view the filings, you must have the Adobe Acrobat Reader<sup>4</sup>, but the document that you get looks exactly like the original filed with the court. Most of the time, retrieval of a docket is only the first step in a reference request. After the attorney looks at the docket, he requests that certain filings be obtained. For this procedure, normally a document delivery service must be used. The Website for the USBC SDNY eliminates the middleman, and at this time, access is free and open to anyone - no password needed. The system is still in the early stages. Users must know the case number and a party name; there is no search capability; and as it is still a pilot program, it does not yet have all the cases available via the Web. The New Mexico court system is also free, but you must register in order to be able to access the case materials. A registration form is available from the Website.

CourtLink imposes order on the chaos that is the PACER system, allowing easy, hassle free retrieval of dockets. However, it does not signal the end of PACER. It is still relatively easy, and much cheaper to retrieve a single docket by dialing directly into the PACER court database. The Web holds great promise for the future of retrieval of court documents, not only dockets but also filings and opinions. However, this does not spell immediate doom for CourtLink either. Web delivery of court documents is still in its infancy and has a long way to go before it is as easy to use as CourtLink.

*Margareta S. Knauff is the Electronic Services Librarian at Dickstein Shapiro Morin & Oshinsky. A self-proclaimed PACER expert, she is responsible for maintaining the connections to over 150 USCA, USDC and USBC PACERs.*

<sup>1</sup> The United States Bankruptcy Court for the Southern District of New York is located on the Web at: <http://www.nysb.uscourts.gov>

<sup>2</sup> The United States District Court for New Mexico is located on the Web at: <http://www.nmcourt.fed.us/dedocs>

<sup>3</sup> The United States Bankruptcy Court for New Mexico is located on the Web at: <http://www.nmcourt.fed.us/bcdocs>

<sup>4</sup> You can download an Adobe Acrobat Reader (for free) from: <http://www.adobe.com>

The PACER Service Center can be reached at (800) 676-6856. DataWest can be reached at (800) 774-7317.

## CD-ROM APPLICATIONS IN THE LIBRARY

by Wanda Gozdz, Consultant  
W. Gozdz Enterprises, Inc.,  
Ft. Lauderdale, FL

**I**N THE LAST ISSUE OF *PLL PERSPECTIVES*, Mark Estes stated that "Information is Power...and technology has changed the way information is used, retrieved or reused" in his article, "Managing Information."

How does the library transcend and prepare itself and its users for multi-media applications such as CD-ROM products? How does our new corporate culture, which was born into a society that understood the organization of books that it could touch and control, shift to feeling comfortable with using electronic resources? For the older researchers, the shift occurs when they understand the organization of electronic data, when they learn how to construct queries in a new way and when they feel comfortable navigating on their computers. For the new kids on the block, researching is transparent regardless of the media format.

So how do you get the decision makers to buy into multi-media resources? How do you convince management to spend money and engage users to learn new ways of researching? Education, education, education!

### BACKGROUND

CD-ROM library products have three major advantages: They store massive amounts of data on a 10-inch disk; they are purchased at a fixed cost; they can be shared over networks. CD-ROM applications work best in a networked environment. Multiple users can simultaneously access many products from their desktops or from remote sites. These applications are typically purchased at a fixed annual cost to the firm, and the cost is spread out among the users.

In the start-up year, the firm incurs the expense of new products, equipment and training. However, these costs are quickly recovered when the users become self-reliant and are therefore more productive in their working environment. The firm may choose to bill the clients for research time.

A firm has to meet the needs of different types of users: the bookworm, the borderline-computer-knowledgeable individual as well as the guru who searches on-line databases like a pro. Users that are not computer literate or skilled in database retrieval are more apt to adapt to CD-ROM and on-line applications once they have had adequate training and time to practice.

The downside of CD-ROM is that the library does not own the product but only licenses its use. The product must be returned to the vendor upon cancellation. However, customers can request that they be able to keep the product they have purchased in up-front contract negotiations.

In order for this technology transition to be successful, the four key players, the library, information technology (IS), administra-

tion, and the users, have to feel that the firm is committed to supporting a three-phase process: investing in new CD-ROM format products; purchasing the correct equipment to serve its internal customers (namely attorneys); and training all users in the applications before they are released on the network and services are canceled in the library. This turnaround time is usually 12-24 months depending upon the size of the firm.

### PRODUCT SELECTION

I recommend that firms start with a survey directed to the user base. The survey we conducted allowed us to capture data that was used to determine how to set up training once products were installed. Products were ranked by frequency of access and by the number of users. Families of the same type are most often recommended so that users do not have to learn multiple applications. Most frequently, state material, statutes and cases ranked highest, followed by Federal or specialty products.

"Simultaneous users" refers to the number of people accessing the same product at the same time. Products are priced on a single user basis, but licensing for multiple users can be purchased. To determine the required number of licenses, use the 1:4 rule: for every four (4) users accessing the same product, one concurrent license is required. Since additional licensing can be added at any time, I recommend starting conservatively and adding users as needed. I recommend a 1-2 user license in

small firms, a 2-4 license in medium sized firms, and a 4+ license in large firms to start, depending upon the product mix and the total number of potential users.

To justify the costs, we compared the annual costs of the print, CD-ROM and on-line products. We then divided the costs by the number of potential users and added a flat billable rate. We were able to determine the cost recovery rate using this formula. Typically, start-up costs were recovered in 3-6 months, depending upon the size of the firm.

**EQUIPMENT REQUIREMENTS**

When the firm has an IS department or a computer consultant, the librarian can prepare a product specification list. A thorough research analysis of equipment availability should be made by the librarian or IS, and both should confer on the selection process. A literature search provided by Lexis-Nexis for this article turned up five good articles on the subject of evaluating equipment specific to CD-ROM needs.

Overall, we have found that CD-ROM platters work best in small firms with 1-4 users. Medium and large sized firms typically use 4+ CD-ROM towers in units of 7 or 14 readers and are supported by CD-ROM servers that run off the network. In offices with multiple sites, CD-ROM applications worked best when the access vehicle is the Internet, utilizing a T1 line, an ISDN line and high speed modems of 38.8 baud or higher. Providing individual towers for frequently used products (such as specialty or State material) used in remote sites that do not have high speed connectivity will reduce complaints from users. However, it should be noted that this arrangement increases the cost of maintenance and equipment.

We strongly recommend getting permission from the vendors to download all products to the hard drive. This gives the library the option to shift products from the reader to the hard drive whenever user needs change. When a vendor provides one product on multiple disks (e.g. West's Federal Reporter), downloading all disks except the monthly updated disk is recommended. This provides for real time delivery of information and minimizes the downtime of the application for updating.

**CD-ROM MAINTENANCE**

Librarians are the keepers of information regardless of its media format. So when it comes to the question of how CD-ROM products should be handled and by whom, I strongly recommend that the library be fully responsible for receiving the products, as well as processing and updating the products if the CD-ROM tower is located in the library. To assist in this process we used the following procedure:

1. CD-ROM subscriptions are mailed to the library by the vendor.
2. Librarian checks in the disk.
3. Products are sent to a CD-ROM IN/OUT box for handling. The best place for the box is near the tower where current CDs exist.

4. Librarian notifies the person responsible for updating the tower in writing or by electronic mail. This can be the librarian or a designated IS person.
5. Librarian receives all superseded disks.
6. Librarian determines if disk should be archived, returned to vendor or trashed.
7. Archival material is placed in a locked box and users are required to sign it out.
8. All electronic research material is kept in one file folder on the network labeled "Research."

**TRAINING**

Creating a test market using 1-4 attorneys prior to releasing the application on the network is important. This procedure assists in ironing out the bugs of the application. The test period is usually 30 days. Once this is completed, users are notified of the training formats. We suggest telephone from the vendor, group training, or one-on-one interactive training sessions. One-on-one works best with novice computer users. Providing CLE credits is always an incentive for bringing the busy professional to class.

When developing training programs, we suggest the following procedures be used:

- Make it mandatory that all users of electronic material come to training on each new product at least once.
- Provide users with a manual of all materials available to them on the network.
- Require all users to sign an agreement with the firm affirming that they fully understand the policies and procedures associated with electronic media products usage.
- Offer monthly or quarterly training and refreshers for the first year, depending upon the needs of the firm.

In summary, change is always a challenge to the human spirit. It brings up many questions and stretches everyone's patience in the process. Librarians have been the keepers of knowledge since time began and, now more than ever before, need to be the agents that bring about the change which enables users to move from being dependent on others for information to becoming self-reliant. It is evident that the librarian must form a partnership with administration, IS, and the users in order to bring a new value added benefit to the firm.

**SOURCES**

1. *PC Magazine*. Sept. 24, 1996. Ziff-Davis Pub. c1996.
2. *InfoWorld*. Feb. 12, 1996. IDG Communications. c1996.
3. *PC Magazine*. Jan. 9, 1996. Ziff-Davis Pub. c1996.
4. *PC Week*. December 11, 1995. Ziff-Davis Pub. c1995.
5. *Computers in Libraries*. July, 1995. Meckler Corp. c1995.

## PLL'S PUBLIC RELATIONS COMMITTEE DOES ALA 1997!

by Barbara Cornwell Holt  
Preston Gates & Ellis LLP, Seattle, WA

**T**HE ASSOCIATION OF LEGAL ADMINISTRATORS held its 26th Annual Educational Conference and Exposition in Seattle from May 19 to May 22, 1997 with 1500 attendees and 200 exhibitors. I learned from ALA that 90% of attendees are employed by private law firms; more than half are principal administrators or executive directors, and the vast majority represent firms with fewer than 30 attorneys.

The Public Relations Committee of the PLL/SIS set up an Exhibit Hall booth during the meeting. The local committee, whose members staffed the booth, began planning for this event in January. During the months prior to the meeting, I relied heavily on ALA's Show Manager, Patty Thurlby, for help in clarifying our many questions. Patty set a great standard for service to vendors, even for a small booth holder like us! She was knowledgeable, quick to respond and unfailingly patient.

ALA programs fell into several broad categories: Communication and General Management; Financial Management; Human Resources Management; Legal Industry; Office Systems Management; Idea Exchanges; Vendor Hosted Workshops. Sessions for the same and different tracks ran concurrently. General sessions were infrequent but impressive; in addition to the keynote address there were two sessions, "Thinking in the Future Tense" and "Understanding and Managing Cultural Diversity," by Seattle cultural anthropologist Jennifer James.

The ALA Grand Opening Ceremony, a conference kick-off of be-bop music performed by the Seattle Men's Chorus, was an energetic opening act for the keynote address presented by William H. (Bill) Gates III. Accompanied by snappy video clips, he shared his vision of the Microsoft legal office in the not-so-distant future. He foresees expanded e-mail capabilities, with less reliance upon faxes; electronic legal filings, with corresponding enhancement to research capabilities; electronic communications with clients that offers security and confidentiality while improving the quality and timing of attorney-client communications. Further, Gates predicts that with upcoming software and hardware improvements, including developments in speech and visual recognition and natural language processing, even more practitioners will be able to take advantage of both desktop computing and the connectivity offered by the Internet.

But ALA offered far more than a lively keynote address. Idea Exchange sessions covered personal injury (plaintiff and defense), intellectual property, multiple offices and corporate legal departments. Communication & management topics included body language, negotiation skills, "futurework," methods for giving praise, presentation skills, leadership and marketing. Systems seminars addressed productivity, intranets, the internet, workflow, imaging and interestingly, office space.

The closing event was the Association Luncheon, which featured the "other" Bill Gates: William Gates, Jr., father of the more famous

Bill. With evident good humor, Mr. Gates looked around and noted that the attendance indicated that ALA participants had figured out the difference between the two "Bills" as there were fewer attendees than at the keynote speech. Mr. Gates compared the needs of the complex, high-tech, multinational client of today to those of the local business clients of a generation or two ago. Not surprisingly, he found as many similarities in substance as there were differences in style; and he offered professionalism and service as the keys to satisfying the needs of either model.

Our vendor-hosted workshop, "Maximizing Information Resources—Does Your Firm Value Its Library?" took place on Wednesday morning and featured Anne Ellis, Jean Holcomb, and Penny Hazelton. Westlaw provided a continental breakfast to attendees, and Lexis-Nexis covered the costs of contacting all ALA attendees via postcard prior to the meeting.

The local PLL-Public Relations committee designed the postcard and mailed it to over 1400 preregistrants, but our primary responsibility was to set up, staff and break down the AALL booth in the Exhibit Hall. The Exhibit Hall makeup was quite a bit different than that of the vendors at AALL. The topical areas with most exhibitors listed included document management retrieval, automated client billing, office supplies, records management, software and training & development. Of course, there were a few very familiar faces—Martindale-Hubbell, Lexis-Nexis, West Group, New York Law Publishing Company.

Our committee, including Jill Allyn, Amy Eaton, Katie Drake, Jean Holcomb, Mary Hotchkiss, Jenny Kanji, Christy Leith, Brenna Louzin, Denyse McFadden, Mark Munson, Curtis Robbins, and Mary Sidell, brought energy and enthusiasm to the meeting. We planned our encounters with booth visitors in advance but had little idea of what to expect when we hauled the AALL traveling exhibit and boxes of handouts into the exhibit hall on Sunday afternoon. We felt just a bit overwhelmed by the complex and sophisticated exhibits, but watching the vendors go through the complicated setups was pretty entertaining.

Booth attendance was steady. A number of folks stopped by to say hello on behalf of their librarian; others were curious or had specific questions. One hundred fifty-seven attendees dropped off business cards for our drawing (for what else? A Toolkit). Our "Law Librarians Tip the Scales in Your Favor" drink holders and our AALL tip cards went like hotcakes. So did a variety of informational items, most notably issues of *PLL Perspectives*, AALL Chapter president lists and PLL brochures. Attendees seemed primarily concerned about library costs and dealing with the variety of format choices. Armed with our handout material and with the cumulative professional experience of our volunteers, we were able to offer a variety of suggestions and options.

Committee volunteers were unanimous in their positive response to the experience. Reaching out to a fresh audience and talking about how we contribute to the practice of law are excellent ways to remind ourselves of our value and commitment to service. We also found this an unexpected opportunity for networking locally. The benefits we received easily matched the time commitments we made. I can heartily recommend this project to librarians at future ALA meeting site cities.

## INDEPENDENT LAW LIBRARIANS CAUCUS COLUMN OFFICE TECHNOLOGY: HOW HAS LAW OFFICE TECHNOLOGY CHANGED

by Ruth G. Balkin  
Balkin Library Management Services,  
Rochester, NY

**A**S LAW OFFICE TECHNOLOGY HAS DRASTICALLY CHANGED in the last twenty years, so have the roles of attorneys and librarians. Offices now rely on voice-mail, e-mail, cd-rom, the Internet, faxes, overnight delivery, cell phones, pagers, computers, self-stick notes (not hi-tech, but very useful), word processing, laser printers, imaging (scanners), tape and remote computer backups. Law libraries now have on-line services for research, on-line document delivery, clipping services and current awareness services, automated cataloging systems, integrated technical services programs for cataloging, acquisitions, and circulation.

In a relatively short time, we have gone from manual typewriters to correcting and memory typewriters to word processors; mainframe computers to PC's to networked and dumb terminals, systems that hook up to laptop and palmtop computers. Even watches are now programmable with information from computerized schedulers.

### HOW HAS THIS TECHNOLOGY AFFECTED LAW FIRMS?

Lance Rose, author of *Netlaw, Law of the Net*, spoke about copyright in the electronic era at the recent AIIP (Association of Independent Information Professionals) conference in Orlando. We spoke with the Arizona attorney about the effect of technology on law firms and the resulting changes in the practice of law. Mr. Lance said that information and technology are essential to the modern practice of law. Lawyers must realize the value of information and technology in order to compete. Mr. Lance further stated that all the hype of the Internet is increasing awareness of the value of information. There are many more resources available now than there were years ago. However, older attorneys won't take the time to use them or realize the value of them because they grew up without them.

Fewer secretaries are needed because attorneys do their own word processing. Response time is speeded up because of technology. Therefore, clients will demand more speed.

However, automation for its own sake is dangerous when the human factor is removed. Automation can lead to standardization of legal products, with less attention being given to clients' individual needs. Clients deserve customized service.

We agree with Mr. Lance's comment about the dangers of automation. There is a tendency to do it because we can, without critically assessing the actual need. Witness all the upgrades in software and hardware. How many of these are really necessary?

Equipment becomes quickly outdated and needs to be replaced. The cost to a law firm or company can be overwhelming, not only for the new systems, but also for the technical support and training needed to keep them running. Then, advancing technology causes the process to be repeated again in another two to three years. Meanwhile, the software that runs the CD's you have been using is "improved" six times, necessitating upgrading the system to handle it and retraining the lawyers to search it.

New technology is very expensive, not only for the materials themselves, but also for the on-going support. Therefore, attorneys are paying much more attention to the expense of maintaining a library and accessing alternative sources of information. At the same time, competition, the economy and technology have made their clients much more cost conscious.

The biggest change in our business has been a refocusing of what services we provide. In managing our clients' libraries we spend more time on administrative tasks, including dealing with the publishers, training and preparing budgets. We can also provide more, better and faster services, such as research, to a wider range of clients outside of the legal community.

### WHAT DOES THE FUTURE HOLD?

The image of the staid, conservative lawyer has changed. In attempting to accommodate themselves to the fast-paced and

competitive climate brought about by all these changes, lawyers are often perceived as road warriors, dashing about with their laptop computers and cellular phones, plugged in to all the technology with everything at their fingertips

Lawyers are now expected to become experts in systems and other technical areas, changing their focus from the practice of law. However, change in technology is so rapid that there is a need for a computer specialist (either a computer consultant, guru, MIS person or department) in law firms of any size.

### WHAT IS THE FUTURE OF LIBRARIANSHIP IN A CHANGING WORLD?

In the midst of these rapid changes, we like everyone else, will need to compete, change and adapt. We are all experiencing information overload. Law librarians are needed more than ever to review data and present useful, organized information to attorneys and to direct them to reliable sources. Our role has always been to organize, manage and provide information. We will continue to do that. Electronic resources such as the Internet especially will need librarians to organize them and develop more useful search engines.

With all the information inundating people, the availability of more on-line resources, and attorneys doing more research themselves, we will have a greater role as guides and teachers.

### ATTENTION: ONE-PERSON-LIBRARY LIBRARIANS!

by Michael Sanint-Onge  
Coudert Erothers, San Francisco, CA

The PLL/SIS is interested in starting a group for One Person Law Libraries (OPLLs). The initial inquiry on PrivateLawLib has elicited a very positive response, and a listserv is in the process of being established to facilitate discussion and the sharing of "best practices" among OPLLs. Stay tuned for more information on how to subscribe.

In addition, the Annual Meeting Program Selection Committee has approved a program specifically targeted to this group: "Time Management for the One Person Library." While time management as a concept has been discussed in several programs at other annual meetings, we felt that the time management issues surrounding OPLLs were so different that they warranted a program all their own. We hope you'll join us for the program at the AALL Annual Meeting in Anaheim in 1998.

Lastly, a meeting for this group is being planned for Anaheim. As you may or may not know, the schedule for the Anaheim meeting is different than previous years. Instead of PLL Sunday, the "big three SISs" (academic, court and private) will be meeting on Wednesday. Our meeting, then, will be scheduled for Wednesday, July 15th in the early afternoon. Pencil it in.

# PLL NEWS

## EDITOR'S INTRODUCTION

**I**N THIS ISSUE we have three reports describing some of the actions which have been taken since the PLL Strategic Plan was introduced in the Spring 1997 issue of *PLL Perspectives* and since the appointment of chairs for some of the committees formed to carry out the initiatives outlined. As you can see from what follows, PLL is moving forward; and *PLL Perspectives* will continue to report its progress toward meeting the goals outlined in the Plan.

First, there is the press release from AALL announcing its intention to publish eight resource guides during the next two years with the support of a grant from LEXIS-NEXIS. These guides are a project of PLL and AALL and are directed toward administrators and intended to assist librarians in establishing and/or maintaining relationships and communications with their employers. Michael St. Onge, PLL Past Chair, is the editor of the series. The first of the guides is entitled "Hiring a Professional Law Librarian" and is expected to be available in November of this year. Among the topics to be addressed in future guides are library budgets and space requirements, changing roles of attorneys and law librarians in electronic legal research and the pros and cons of the Internet as a tool for legal research.

In our second article, Kathie Sullivan, Chair of the Consumer Advisory Committee for Private Law Librarians (CAPLL), reports on the planned activities and projects of the committee. She describes some of the projects which are being planned and the specific means by which the committee is planning to create resources and to assist librarians in making efficient use of materials and in making knowledgeable decisions when faced with questions from employers and vendors.

Our third item is a report from Hazel Johnson, the AALL official representative to the ABA Law Practice Management Section, on her attendance at the May meeting of the section. Hazel gives a description of the makeup and activities of the section and of some of the projects which are being undertaken to increase the presence of librarians in it. She also mentions that the LPM publishing section is interested in receiving articles by librarians thus providing another means for increasing librarian visibility

## AALL AND LEXIS-NEXIS TO PUBLISH LAW LIBRARY RESOURCE GUIDES

**T**HE AMERICAN ASSOCIATION OF LAW LIBRARIES (AALL), with the generous support of a \$50,000 grant from LEXIS-NEXIS, will produce a series of eight resource guides over the next two years. The guides will build on the success of the recently-published marketing toolkit, *Law Librarians: Making Information Work*, also supported by LEXIS-NEXIS.

These eight guides will cover a variety of topics that will assist law firm librarians in communicating more effectively with their employers about issues of law firm library management and access to legal information. The first resource guide will be *Hiring A Professional Law Librarian*, to be published in November 1997. It will address the qualifications employers should look for when hiring a professional law librarian as well as what recruiting resources are available on a national and regional basis.

Future resource guide topics include firm library budgets and space requirements in the electronic age, changing roles of attorneys and law librarians in electronic legal research, and pros and

cons of the Internet as a tool for legal research.

AALL member Michael Saint-Onge (Coudert Brothers, San Francisco, California) will be the series editor. He and several contributor editors will develop and prepare each of the resource guides. On the value of these new resource guides, Saint-Onge said, "If we're serious about building bridges to our constituents, these guides are the best foundation. They are the perfect complement to the AALL toolkit, which helps librarians market themselves more effectively in today's competitive legal marketplace. They are focused outward, to our administrators and managing partners, to address critical issues facing law libraries today."

The American Association of Law Libraries was founded in 1906 to promote and enhance the value of law libraries to the legal and public communities, to foster the profession of law librarianship, and to provide leadership in the field of legal information.

Contact:

**Roger Parent**  
Executive Director  
312/939-4764  
pr@aall.org

## PLL STRATEGIC PLAN CALLS FOR CONSUMER ADVOCACY COMMITTEE

by Kathie J. Sullivan  
McNamee, Lochner, Titus & Williams,  
Albany, NY

**T**HE PLL STRATEGIC PLAN 1997-2000, presented to PLL members at the AALL Annual Meeting in Baltimore, includes a vision statement recognizing the powerful force of law librarians in shaping publishers' practices and services. Specifically, the Plan recognizes the changes that have taken place in the practice of law over the last ten years and the effect these changes have had on the private law librarian. Key among the many changes are those which have to do with the restructuring of the legal publishing industry.

The Consumer Advisory Committee for Private Law Librarians (CAPLL) was formed, in part, because its work would affect the largest number of PLL members. The goals of the committee include educating and empowering members to be better consumers; representing members in proactive efforts with publishers; educating members regarding prudent use of resources; identifying the materials members have available to help them in daily efforts to manage resources. In short, the CAPLL hopes to become an advocate for librarian interests, to educate our members, and to partner with information providers in accordance with the goals of the Strategic Plan.

Law firm economics have changed. There are no standards for collection development from the ABA, for example, to provide guidance. We are pressured from both sides (managing partners and publishers) to cut costs or to make purchases, and we have to make hard decisions. However, cutting costs and titles is difficult to manage when we don't have sufficient information for our evaluation. We are understaffed; we are on short deadlines. Librarian listservs and professional publications are a big help on a daily basis, but we often use these tools to find "quick" answers to respond to emergencies. Often newer law firm librarians and even those who have been in the field for some time do not know of the materials available to them to aid in decision making.

It is the hope of the CAPLL that we can provide some of this missing information to PLL members. The CAPLL Committee might be considered both a consumer alert body and a mentoring system of sorts. We hope to provide some product evaluations, particularly in practice areas or markets where there are competing titles, and to provide some practical, real-life materials that librarians can put into their work files to use as needed without having to create from scratch (form letters, templates, software programs, etc.) As one of our first projects we plan to create a series of form letters to be used for invoice disputes, unauthorized shipments, or missing items.

We also hope to produce a practical guide to using the AALL Price Index more effectively in the law firm library. It is difficult for many of us to use this publication because our collections do

not mirror the titles used to prepare the Index. While we may purchase the Index, we are often stymied as to how to make use of the information. We hope to provide not only some practical and functional guidance in using this publication, but also, to have an opportunity to work with the author(s) of the Index to modify the list of titles used in its preparation in order to make the Index a more universal tool.

The third project of the committee is to write a column for each issue of *PLL Perspectives*. The results of some of the projects we are working on will appear in this column or as an insert to the newsletter. We will be putting materials on the PLL Web site and on occasion we may use the PLL listserv to poll members for information. We hope you will respond to our questions as we post them.

By any standards, we have a very large committee, currently at fifteen members. At least half of these people were asked to serve because of their past work in monitoring prices and practices of publishers and in informing colleagues of changes in publications. The rest of the committee members volunteered and asked to be a part of this initiative. All of the members are to be commended for taking on what may be a huge project but one we hope will be manageable because of our numbers.

We have ambitious projects ahead of us, but we are confident that our efforts will produce information which will be useful to a large number of people. We hope you will watch *PLL Perspectives*, the listserv and web site to chart our progress. If you have suggestions for projects the Committee may undertake on your behalf, please feel free to contact Kathie Sullivan, the chair of CAPLL. The full roster of the committee will appear on the PLL Web site, and any of the members can be contacted with project ideas.

### Kathie J. Sullivan

Library Director  
McNamee, Lochner, Titus and Williams, P.C.  
75 State Street P.O. Box 459  
Albany, New York 12201-0459  
Phone: 518-447-3266  
FAX: 518-426-4260  
e-mail: mltwkjs@transit.appliedtheory.com

## PLL PERSPECTIVES

### ISSUE DEADLINES

The deadlines for submission  
of articles for PLL Perspectives are as follows:

<i>September issue, no. 1</i>	<i>July 15</i>
<i>December issue, no. 2</i>	<i>Oct. 15</i>
<i>March issue, no. 3</i>	<i>Jan. 15</i>
<i>June issue, no. 4</i>	<i>Apr. 15</i>

## AALL AND LPM— A RELATIONSHIP FOR THE FUTURE

by Hazel L. Johnson

Law Library Services Consultant,  
Richmond, VA

AALL Official Representative to the  
Law Practice Management Section

**E**ARLIER THIS YEAR, following several years of PLL encouragement, the AALL Executive Board established an official representation to the American Bar Association's Law Practice Management Section. AALL, with the assistance of PLL, provides financial support for the representative to attend meetings of the Law Practice Management Section. This financial support facilitates more active involvement in the activities of the section, thereby raising the visibility of law librarians. There have been individual law librarians active within LPM for a number of years, but this is AALL's first formal relationship with the section.

A relationship with LPM has the potential to be particularly valuable for PLL due to the composition of the section's membership

and the section's activities. It is one of the ABA's largest sections with more than 20,000 members, comprising 5% of total ABA membership. Almost half the members are solo practitioners or are with firms of 2-5 attorneys. Eighteen percent of the membership is considered "young lawyers" (under age 36). Most members are involved to some degree in the management of their firms. Consultants, bar executives, firm administrators, law librarians, and other associate ABA members comprise 10% of the membership.

LPM is involved in a myriad of activities. The section sponsors TECHSHOW in Chicago each year. It has an extensive publishing arm, which produces *Law Practice Management* magazine and a wide variety of books on law firm management. It is actively seeking partnerships and cooperative projects with other organizations of legal professionals like the National Association for Law Placement and the National Law Firm Marketing Association. The section, with assistance from Lotus, is sponsoring a Futurist Conference in the fall to discuss the future of the legal profession and the legal services delivery team. This is a group of legal professionals that needs the skills of law librarians and is very receptive to our message. Numerous opportunities exist for law librarians to get involved.

The Section meets four times per year: at the ABA's midwinter and annual meetings and independently in the spring and fall. Approximately 200-300 section "actives" (individuals serving on the various section entities) attend and conduct the business of the section. If AALL's committees met with the AALL Executive Board, the meetings would be similar. As co-editor of the Books column in *Law Practice Management*, I attended the November 1996 meeting where I met many of the individuals involved in section activities. During the May meeting, after my appointment as AALL official representative, I was able to spend time talking with these individuals about potential areas of cooperation between the two organizations. Additionally, the PLL leadership had the opportunity to talk with Joel Bennett, solo practitioner in Washington, D.C., Chair of the Section and Gary Munneke, Pace University Law School Chair-Elect, about potential opportunities during the AALL meeting in Baltimore.

Thus far, three specific areas of opportunity have been targeted. One, AALL Executive Director Roger Parent is discussing the potential for cooperative projects with Mr. Munneke, Chair of the section's Partnering with Profit and Non-Profit Entities Task Force. Second, a proposal is being developed to add a law librarian to the consulting team of the Practice Management Advisors program of the state bar associations. Finally, publication opportunities for law librarian authors abound within the section. *Law Practice Management* magazine, interest group newsletters, and the Publishing Board would love to have articles and manuscripts from law librarians about library and technology issues affecting the smaller law firm.

Additional opportunities for collaboration are in the early discussion stage. I encourage you to join the section, to volunteer for a committee or interest group, to write articles, and to let me know if you have questions or suggestions on ways we can make this representation AALL's best and yet another way for PLL to be the voice of the private law librarian.

# Law Librarians Make Marketing Work With AALL Tool Kit

**L**aw Librarians: Making Information Work, AALL's new Tool Kit, is drawing rave reviews from law librarians as they use it to market and demonstrate their value. Whether they're using it for reference or putting its practical ideas to work, everyone agrees the Tool Kit is an excellent investment.

**"It is the most practical and ready-to-use kit if you want to jump-start your library's marketing campaign,"** said the *Marketing Treasures* newsletter (September/October '96) in a review that gave the Tool Kit "two thumbs up." "AALL has clearly thought through the entire marketing process. First, define your business. Second, know your clients' needs. Third, design your marketing campaign."

The article explained what Tool Kit users have found — it has almost all the ideas and tools you'll need to market your library, including:

- "Making A Law Library Work" Management Briefing
- "Gathering Statistics" Handbook
- Sample Mission Statements and User Survey
- Law Librarian Standards
- Q&A about the value of law librarians
- Marketing Briefing for Librarians
- Detailed bibliography

## ■ Management Made Easier

**"Every law library should publish an annual report and circulate it throughout the firm."**

AALL Tool Kit

"It was the best purchase I could have made," says Charlotte Henderson, Librarian at Streich Lang PC (Phoenix), who became library manager when her supervisor retired. "In my first three months I was asked for a departmental cost budget, a database standard collection analysis, a library mission statement, and a legal research policy for the library staff." She managed to produce it all with little background or training, "All with the help of the Tool Kit!"

## ■ Quantify Your Effort

John Klasey, Librarian at Coffield, Ungaretti & Harris (Chicago), started keeping library statistics after purchasing the Tool Kit and now gives monthly statistical reports to firm management.

**"Before, when someone would ask what we did all day, we could list all the things, but we didn't have proof until now. I found the statistical handbook worth the money by itself,"** Klasey says.

Other Tool Kit materials, like the Mission Statements, Librarian Standards and User Surveys, are ready to use and make a library manager's job easier. Writing job descriptions, library goals and business plans can be as quick as using the right reference books to pull and combine key information. Patricia Patterson, Director of Library and Information Services at Schiff, Hardin and Waite (Chicago), used the librarian standards to create a job description and benchmark for a new entry level librarian position, which she "sold" to management by demonstrating the need with library statistics.

## ■ Promote Your Value

Mark Estes, library director at Holme Roberts & Owen LLC (Denver), bought Tool Kits for all his professional staff so they would "see it and integrate the messages into their own conversations with lawyers." He uses the Q&A to "create those 30-second commercials for what the library is doing," which he says all librarians should use to promote their individual (and collective) value to patrons.

An easy and attractive way to reach decision-makers in your organization is to give them copies of the 16-page Management Briefing, "Making A Law Library Work." Written in "manager-speak" with

**"Two thumbs up!"**

— *Marketing Treasures* newsletter

sections including Technology, Resource Management and Profitability, it is designed to help top management understand how professional librarians manage and use information to an organization's advantage.

After reading it, one Library Committee member in Patterson's firm admitted, "There's more to the library than I had thought about." All managers should have one!

## ■ Academics need help, too

With law school enrollments trending down, academic librarians also will find the Tool Kit useful. When his dean was asking tough questions, Duquesne University Law Library Director Frank Liu says, "The Tool Kit gave me exactly what I needed to describe the rapid changes in information technology, and justify the roles of librarians."

**"We have to run the library more like a business — very cost-conscious and customer oriented,"** Liu continues. "There is so much change with technology now, it's not going to be business as usual. We all have to justify our existence, you can't take things for granted."

**"It was the best purchase I could have made"**

— new library manager

## ■ Order Your Tool Kit today

Use the form below to order the Tool Kit and start using it to make your library more productive, marketing-oriented, and appreciated!

**Law Librarians**  
In making work

**Find new ways to demonstrate your value — order today**

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY STATE, ZIP \_\_\_\_\_

PHONE \_\_\_\_\_

**Tool Kit Price: Only \$25 for AALL members, \$35 for non-members (includes shipping)**

Order	Quantity	Price each	Total enclosed
Making Information Work Tool Kit	# _____	\$ _____	\$ _____
Management Briefing Packets* (5 copies/\$15)	# _____	\$ _____	\$ _____

Check  
 Visa, MasterCard  
(Circle One)

# \_\_\_\_\_

Signature \_\_\_\_\_