

# PLL PERSPECTIVES

THE QUARTERLY OF THE PRIVATE LAW LIBRARIES SIS OF THE AMERICAN ASSOCIATION OF LAW LIBRARIES Volume 11 Issue 1

FALL 1999

## NOCALL AD HOC COMMITTEE ON THE ALA SALARY SURVEY

by Nancy Adams, Sheppard, Mullin, Richter & Hampton, LLC, San Francisco, CA

In October 1998, the Mid-Size Firm Librarians Group of San Francisco law librarians decided that they had spent enough time bemoaning the low levels of and inequities in their salaries. A number of us had tried to approach our office administrators with data from the AALL Salary Survey in an effort to have our salaries adjusted, only to be rebuffed with the dreaded Association of Legal Administrators Salary Survey.

The ALA salary survey is done annually in the San Francisco Bay Area and in the past has included only three categories: Head Librarian, Assistant Librarian (hourly), and Library Technician. Group members had said at several meetings that they thought the ALA salary figures were highly inaccurate and that the job descriptions did not match the reality of law firm jobs, so we decided to do something to improve the situation.

As a first step, we decided to do a survey among our members. At the meeting, we each filled out a questionnaire that asked for salary, bonus, professional degrees, years of experience, and number of years in current job. We also tallied the number of attorneys supported, number of persons supervised, number of offices supervised, and other responsibilities (conflicts, records, etc.). All the survey information was written on a large white board, where we were able to see for the first time just how comparable our situations were.

Interestingly, our salaries did not seem to correlate to years of experience, number of attorneys supported, recent job changes, or other responsibilities. They also bore little relationship to the salaries quoted in the ALA survey. We decided to form a committee to look at the ALA survey to see if we could help shape it to better reflect our jobs and more appropriate salaries.

Mark Mackler, Marlowe Griffiths, Cynthia Papermaster, and I met several times to determine our course of action. The NOCALL Board gave us the go-ahead to act as an ad hoc committee. We contacted the local ALA chapter and found that each chapter does its own salary survey, and the contents of each survey are determined locally. With this knowledge, we gathered job descriptions for librarians and paraprofessionals from our group and then removed any identifying information from them. We also retrieved the sample job descriptions that were prepared by the PLL Committee on

Private Law Librarian Standards in 1996. A call to AALL revealed that these job descriptions had never been given to ALA.

I then called the local ALA survey chair and invited her and her co-chair to lunch with Mark and me. We had a lovely lunch at a local restaurant, and we explained that our goal was to help them make their survey more accurate and representative. They were receptive to our help and expressed appreciation for the sample job descriptions. Neither had ever worked in a firm that had a librarian, so their perception of a librarian's job was a little unclear. The question I remember most was, "So, do most librarians have a college degree?" They were surprised to hear of the existence of the M.L.S. degree and were not aware of the significant differences between professional and paraprofessional jobs.

A few weeks later, the survey chair sent Mark and me their revised job descriptions for the survey and asked if we had any suggestions or revisions. We made some minor changes and returned them.

Last week, Mark called the chair to see if she had any further questions. She told him that the 1999 survey had just gone to press and that it includes an expanded section for library employees with more detailed job descriptions and more levels of responsibility. Now we just have to wait until the survey results are collated and published.

Even if there is no noticeable change in our individual salaries, the ad hoc committee has had a positive effect. At the very least, we have forged a positive relationship with the legal administrators. We were very careful to make our contacts with them in the context of helping them produce a better, more accurate survey, not as an effort to get our salaries increased. They appreciated our help and expressed a wish that other professional groups would do the same.

Taking positive steps to improve our profession doesn't have to be an overwhelming project. Some committee meetings, a pleasant lunch, and some friendly persuasion were all that were required in this case. We hope that other local chapters of AALL will follow our lead and contact their local ALA chapters to help make their local salary surveys more representative. ■

# PLL PERSPECTIVES

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## PLL DEADLINES

Fall – August 15    Spring – January 15  
Winter – October 15    Summer – April 15

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**West Group is proud to support  
the AALL-PLL by laying out its  
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## FROM THE CHAIR

Kathie J. Sullivan, Downs Rachlin &amp; Martin PLLC, Burlington, Vermont

For those of you not in attendance at the PLL business meeting in Washington on July 18, let me start this column by saying, "I bring you greetings from Vermont."

If you have been reading your e-mail and various AALL and PLL publications, you know I have moved – lock, stock, and barrel. And the unpacking continues, both at work and at home. I thought I would be smart when packing and keep all the various PLL electronic and paper files accessible. I had notes for this column, notes for future articles, e-mail messages to return. Do you think I can find any of those things now? The packing process was interesting. I found lots of letters from people I've lost touch with, rosters of attendees at seminars, and meaningless scribbles on scraps of paper. Once, those were important for some reason. Maybe it will come back to me.

I thought long and hard about this first column and what extended metaphor I might use to describe PLL plans for this year. I have found lately, since I became a PLL cheerleader and poster girl, that I tend to speak in clichés. I would have made a good Madison Avenue type, I think. I have used "*PLL: The Next Generation*", "*Committee Chairs for the Millennium*," and I've fallen back on "*PLL: The Energizer Bunny SIS*" (except the licensing fees are too high!). All of these slogans have worked to some extent already. Some of you got on the bandwagon early and volunteered for committee work (I stopped counting at 80!). And then your excitement became infectious, and like a benevolent virus, that infection spread; I have received messages saying "Tell me how I can help." (By the way, when they make "*PLL: The Movie*", I'd like Camryn Manheim to play me.)

Since I couldn't decide how to approach this column, I've decided to use mixed metaphors this month. In fact, the mixed metaphor may be the perfect device to use when discussing PLL members, activities, and interests. We are a mixed group. We are employed in branch offices; in small offices; as records managers, staff administrators, directors, solo librarians, and multitasking librarians; and some are self-employed. The list goes on.

How can PLL expect to serve the needs of such a diverse membership? First, we count on the members to tell us what they need and to help us shape the future paths of the SIS. Our last strategic plan was dated 1997–2000, and guess what? The end of it is in sight. Martha Goldman is chairing a task force of members with experience in drafting strategic plans, but they can't speak for 1,500 individuals. Each and every one of you needs to think about the future directions, goals, and projects of the SIS and to send those ideas to Martha ([Martha\\_A\\_Goldman@jonesday.com](mailto:Martha_A_Goldman@jonesday.com)).

Second, we serve a diverse membership by sharing our expertise and mentoring new law librarians, encouraging them to develop new skills and helping them to find a niche in the SIS through volunteering. Every committee has one "newer member" on it this year so they can start becoming involved in the workings of the section. Jane McMahon ([jmcmahon@brobeck.com](mailto:jmcmahon@brobeck.com)) reports a record number of mentors and "mentorees" this year; did YOU sign up to share your best practices with a newer member? We all have something to share to make the job easier for a colleague.

Several people stepped forward and offered to help with the PLL Web site when the message was distributed. Roger Skalbeck helped with an immediate need and offered to help teach some basics to Web-development novices; Terry Psarras ([TPSARRAS@balch.com](mailto:TPSARRAS@balch.com)) is now putting updates and corrected information on the site on an almost daily basis. Have you checked out the site recently? Did you know it has a search engine now? Take a spin at <http://www.aallnet.org/sis/pllsis>, and feel free to send suggestions for improvements to the content. Better yet, offer to provide some content. You've heard of publishing on the Web, right?

Third, we serve the diverse membership by reporting on SIS activities and AALL activities, largely through *PLL Perspectives* (with MANY thanks to our editor, Jan Brown), the PLL-SIS listserv, and in the future, on the PLL Web site. I think we also serve the SIS by taking active leadership roles at the national level, whether it be as a liaison to the Law Practice Management section of the ABA, by speaking at a chapter meeting of the Association of Legal Administrators, by proposing programs for annual meetings, or by serving on AALL committees. Leadership is the theme for the 1999–2000 year and the 2000 annual meeting, and PLL members have the skills and influence to take a front-row seat at the festivities. Will you be seated with them?

You know the slogan for the Army Reserve: "Be all that you can be." And Maslow's theory of self-actualization would have us believe we need to take on new challenges and seize new opportunities in order to be self-fulfilled (PLL can satisfy "esteem" and "self-actualization" in your hierarchy!). If you have seen *Maslow on Management*, you'll know he discusses "'enlightened management' in terms of cultivating self-actualized, highly motivated employees." Have you ever known an unhappy PLL member? If your answer is "yes", I bet that person was not involved in the SIS! Give yourself the gift of mental health and join the ranks of the Happy PLL Members and Leaders: think strategically, befriend a newer colleague, and write about it for *PLL Perspectives* or the PLL Web site. You'll be glad you did. And you'll feel better for it. #

## MINUTES OF PLL 1998–1999 EXECUTIVE COMMITTEE MEETING, JULY 17, 1999, WASHINGTON, D.C.

by Holly Mohler, PLL Secretary, Long & Levit, San Francisco, CA

**G**len Gustafson, chair, called the meeting to order at 4:05 p.m. In attendance were Glen Gustafson, Claire Engel, Lee Nemcheck, Holly Mohler, Laura Hyzy, Jill Porter, June MacLeod, Anne Ellis, Kathie Sullivan, Ann Jeter, and Joanne Dugan.

Glen thanked Jill Porter for her work on creating the new PLL Standards & Guidelines trifold brochure. We need to update the information in the PLL/SIS brochure that AALL printed for us, and to contact Peter Beck about revising and reprinting it.

Glen then spoke on the subject of fund-raising, since the only income that PLL gets currently is from advertisements in *PLL Perspectives*. After brainstorming for ideas for fund-raising – including the sale of T-shirts, badge holders, Christmas cards, and note cards – those present decided that the board would look into the costs for some of these ideas to see if we want to pursue them further.

Glen reported that West Group and PLL cosponsored a morning workshop session at LegalWorks '99 this year and that all PLL members got discounted registration. The hope is that PLL will continue to work on publicizing itself to other groups, thereby raising our perceived value.

Kathie Sullivan reported on her experiences at ALA this year. About 30 people stopped by the booth in the Exhibit Hall, and visitors were put in touch with chapter presidents in their area, when possible, to assist them. Visitors' concerns centered on getting rid of books in favor of electronic media, hiring a law librarian, and vendors wanting to purchase mailing lists. No PLL programs were accepted this year, and there seems to be an erosion of interest in PLL at ALA. The reciprocal agreement that we have maintained in the past for a free booth at each other's annual meeting may not continue. There was a brief discussion of how we might continue to have booth representation at ALA in the future.

Kathie suggested that someone look at the ALA proposed programs and see if they can't be tweaked and submitted for AALL next year. Glen suggested that these same programs might be held for regional ALA meetings since there might be a more receptive response to programs at the regional level. Kathie suggested conducting a panel discussion on a particular topic, working with another group (Council of Chapter Presidents, SLA, etc.) to find appropriate speakers and maintaining the same topic for all of the regional meetings.

Holly Mohler read the Secretary's report, and there was a brief discussion about changing the PLL bylaws so that the election balloting could be done more economically. Holly will look at some other SISs

and chapters and work with the Bylaws Committee chair, Johanna Bizub, to draft a bylaws amendment to be voted on next year.

Claire Engel read the Treasurer's report and reported that Global Securities has given us \$10,000, to be used by the PLL Grants Committee, and that \$1,000 of it was used for grant recipients this year. Anne Ellis asked if each of the PLL grant recipients could write a thank-you letter to Global Securities. There was a discussion about changing PLL's fiscal year to October 1 to September 30 to put it in synch with AALL's fiscal year, and the change was approved. It was agreed that this change should be noted in the revised version of the *PLL Procedures Manual*.

There was more discussion about the PLL brochures that AALL produced, and Amy Eaton, Public Relations Committee Chair, was charged with looking into the cost of revising and reprinting these. Claire will put \$1,000 into the budget for this, just in case, and also will add money to the budget to cover purchasing new souvenirs to give out as freebies at CONELL, ALA, etc.

Glen Gustafson adjourned the meeting at 6 p.m. ■

MINUTES OF PLL BUSINESS MEETING,  
 JULY 18, 1999, WASHINGTON, D.C.  
 by Holly Mohler, PLL Secretary, Long & Levit, San Francisco, CA

The meeting was called to order by Glen Gustafson, chair, at 7:23 a.m. He announced that the tables were labeled with the PLL/SIS committee names so that people could meet others on each committee or learn more about and offer assistance to, a committee.

Glen acknowledged Richard Harrison from Global Securities, who introduced the Global Securities staff attending the meeting. Richard thanked PLL for its tremendous support and said that GSI wanted to give back to PLL by providing money for travel grants for members to attend the AALL annual meeting. Glen announced that Global Securities has given \$10,000 to the PLL Grants Committee.

Some general announcements were then made. Glen reported that more Resource Guides would be coming out soon. He urged people to attend the AALL business meeting at which the amendment to the bylaws to change membership will be discussed. Mark Estes spoke on the issue briefly.

Glen asked everyone to observe a moment of silence in memory of our colleagues who passed away this past year.

**EXECUTIVE COMMITTEE REPORTS**

Glen Gustafson noted that there were three initiatives undertaken this year: strategic partnerships with the Association of Legal Administrators, the ABA Law Practice Management Section, and public forays into other areas.

Holly Mohler, Secretary, reported on the election results this year, first thanking the Nominations Committee and Johanna Bizub, committee chair. She reported that 1,409 ballots were mailed out, and 537 were returned. The following individuals were elected to the 1999-2000 Executive Committee: Ann Jeter as Vice-Chair/Chair-Elect, Lauri Flynn as Treasurer, and Joanne Dugan as Executive Board Member. A motion was made, seconded, and approved to destroy the ballots.

Claire Engel, Treasurer, reported that PLL has stopped the outward flow of money and the erosion of funds she reported on last year. This resulted from a combination of efforts, including increased PLL membership to 1,472, lowered costs for attending the ALA conference, thanks to Kathie's frugality and David Rogers' and his folks' help running the booth, and increased revenue from advertisements in *PLL Perspectives*, thanks to Rachel Jones' and Howard Trivers' efforts. Income from sales of a reprint of an article in *PLL Perspectives* also helped, as did the Global Securities donation of \$10,000. Other factors, included the costs of the election being lowered.

Our beginning balance this year was \$14,444.05, income as of May 31 was \$22,343.75, and expenses were \$13,090.67, leaving us with a balance of \$23,697.13. Claire also reported that the Executive Committee has confirmed a new fiscal year for PLL which will now be October 1 to September 30, bringing us in synch with AALL's fiscal year. This change will ease the work of the Treasurer as well as allow greater accountability of funds by the Chair.

**STRATEGIC PARTNERSHIP REPORTS**

Kathie Sullivan, Vice-Chair/Chair-Elect, reported on her experience at ALA this April in Chicago. There was a booth there staffed by PLL members. Kathie thanked David Rogers, Peter Beck, and all others who helped with the setup and staffing of the booth and saved us money.

There were 30 visitors over the three days. Most of their questions centered on how to look for local contacts to hire librarians, or how to deal with the issue of tossing books in favor of electronic resources. Thanks to Jill Porter and June MacLeod, a new trifold pamphlet outlining PLL Standards and Guidelines for law librarians was available to hand out to visitors, as were copies of the Model Law Firm Copyright Policy and the recently approved Ethics Guidelines for librarians. Jenny Kanji and her committee submitted five program proposals for ALA, but none was accepted. Kathie has suggested that we try to get some of these programs selected for and presented at ALA regional meetings. The Executive Board is discussing our presence at the ALA national meeting and several options for continued participation. Our goal is to maintain this liaison. If you have any ideas or thoughts on this topic, please contact either Jenny Kanji or someone on the PLL Executive Board.

Hazel Johnson reported on the strategic partnership with the ABA Law Practice Management Section. This is the third year PLL has had representation in this section. PLL has pushed for this relationship, and it has been cosponsored and cofunded by AALL. Due to a change in policy this year, the ABA did not take open programming proposals for its meeting in Atlanta, but we will try to get some in programs for 2000. Hazel has worked on establishing connections between Law Practice Management advisors of the various state bar associations and PLL, creating ways by which local chapters can get involved in local programming or pro-bono consulting. She added that the D.C. and Arizona chapters have already made the connection and will be presenting programs. In May, at the spring section meeting, Hazel did a presentation called "Building a Law Library on a

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Shoestring.” She is still a member of the ABA TechShow Planning Board and is responsible for the NetTrack and the Internet Lab. She is working hard to get law librarians on the programs at the 1999 meeting. The ABA Law Practice Management Section is also cosponsoring two programs this year at AALL. Hazel mentioned that Peter Krakauer of FindLaw is creating a library of materials, building content on their Web site, and needs materials—anything we’ve written for associations, firms, individually, etc. Hazel encouraged everyone to join the section and get involved by writing articles for the section newsletter. She also stated that this is the first year that there has been an ABA booth in the AALL Exhibit Hall.

#### STANDING COMMITTEE REPORTS

Jenny Kanji for the ALA Programs Committee: Jenny thanked her committee and stated that they already have four program proposals for 2000 and are very hopeful that they will be accepted.

Glen Gustafson for the Bylaws Committee: Glen reported on a change to be made this year in order to reduce the cost of the election process. The proposed change would allow the ballots to be printed in *PLL Perspectives*, torn out, and mailed in at the expense of the voters. Later on, the Board will look into the possibility of electronic ballots. Watch for the announcement of the bylaws amendment. The ballot for the amendment will be sent out this year with the annual mailing for the elections.

Glen Gustafson for the Consumer Advocacy for Private Law Librarians (CAPLL) Committee: Glen stated that the Board is reconsidering whether or not to continue this committee as CRIV has largely assumed its role.

Martha Goldman for the Strategic Planning Task Force: Martha reported that this committee is regrouping in order to totally revamp the strategic plan this coming year, working with the Board to decide which way to move. If you want to join the committee, please talk to Martha.

Joanne Dugan for the Education Committee (2000 Philadelphia): Joanne reported that her committee will meet tomorrow at 7 a.m. and encouraged anyone with ideas for programs to attend.

Glen stated at this point that we should consider doing programs at ALA regional meetings or anywhere else we can push toward other groups. These efforts will heighten our profile, and allow us to get our expertise known beyond AALL.

Cornell Winston for the Grants Committee: Cornell reported that PLL gave grants totaling \$2,500 to five individuals. He encouraged everyone who doesn’t have the support needed to attend the AALL annual meeting to utilize the grants. He thanked Global Securities again for its contribution.

Jane McMahon for the Mentoring Committee: Jane reported that the committee is working with AALL and looking into building the program, possibly expanding it to the chapter level or using Lexis-Nexis and Westlaw representatives to look for mentoring opportunities. She also stated that eight PLL members currently need mentors. If you are interested in being a mentor for one of them, please contact Jane.

Rachel Jones for the Newsletter Committee: Rachel read a report from Michelle Schmidt, chair, which stated that the budget went well, thanks to dependable advertising from companies such as Global Securities, Lexis-Nexis and West Group, who place multiple advertisements. The committee has recruited someone new from a different geographic region and hopes this will bring in new, different advertisers.

Johanna Bizub for the Nominations Committee: Johanna encouraged everyone to vote in the elections and to encourage others to do so as well, noting that we had a return rate of only 38 percent for PLL ballots this year. She stated that Anne Ellis is the incoming chair of this committee and thanked everyone who accepted a nomination this year.

Jill Porter for the Public Relations Committee: Jill reported that this committee produced a trifold brochure for ALA this year outlining PLL Standards and Guidelines for law librarians, including the 1998 changes. Amy Eaton is the incoming chair.

Glen Gustafson for the Research Instruction for Private Law Librarians (RIPLL) Committee: Glen reported that we are looking at whether to continue this committee.

June MacLeod for the Standards and Guidelines Committee: June reported that this year, they reviewed the standards and guidelines as well as the SLA guidelines and determined that ours are still applicable. She is hoping to work more closely with AALL this year, specifically with Kay Todd and the AALL Professional Development Committee.

Glen Gustafson for the Technology Committee: Glen reported that we are in the process of redesigning the PLL Web site, adding a number of documents, and including information from the last couple of issues of *PLL Perspectives*. The committee is also working on the possibility of adding some guides or pathfinders.

#### ROUNDTABLE, CAUCUS, AND OTHER SUB-GROUP REPORTS

Ruth Balkin for the Independent Law Librarians Group: This year, the group beefed up its communications internally, using its listserv, and also within its community. The group contributed to every issue of *PLL Perspectives* this year. Ruth is putting together a scrapbook of business cards and brochures to ease the process of making referrals. She received 17 calls this year for consultants, primarily in the areas of automation and space planning. Ruth has been asked to cohost a seminar for a local bar association titled “Managing the Technological Library.” The group also has a program this year at AALL called “Information IS Knowledge.”

Betty Roeske for the Technical Services Group: Betty reported that this group has a program tomorrow at 7 a.m. with three Lexis-Nexis representatives. She encouraged everyone to attend to show that we are really concerned about what they are doing.

Lee Nemcheck for the Records Management Group: Jeanne Reynolds,

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founding member and chair, was unable to attend. She transmitted her annual report to Lee, who read it, annotated with her own comments. This year, Lauri Flynn successfully moved the group's listserv to Washburn, the group consistently submitted articles for publication in *PLL Perspectives*, and the group submitted a program, jointly sponsored by PLL and ARMA, to the ALA Education Committee for their conference in 2000. Jeanne Reynolds regretfully resigned as chair of the group, and Lee represented the group at the conference and will preside over the business meeting.

Laura Hyzy for the Multi-Library Group: Laura reported that, although this is a relatively new group, they have already identified several projects to undertake in the coming year.

#### **PUBLICATIONS**

Glen discussed some of the PLL publications and what is planned for them. The PLL Web site will continue to change and grow as part of the Technology Committee's effort. The Procedures Manual will be revised and rewritten this year. AALL will be reprinting the Toolkit this year, and PLL will be revising some of the content, including the new PLL Standards and Guidelines. The PLL Strategic Plan will be fine-tuned this year, and the Board will work with Martha on a new one.

#### **NEW BUSINESS**

Glen opened up the floor for anyone to voice concerns about or offer opinions on the proposed AALL membership change. There was a lengthy discussion; opinions were expressed on both sides of the issue. All members were urged to go to the AALL business meetings and vote on these proposed amendments.

At this point, the meeting was turned over to Kathie Sullivan, the new Chair, who made a few announcements. Roger Skalbeck has done some work on the PLL Web site, but he will not be the permanent webmaster. She encouraged everyone to visit the vendors, meet someone new, attend both AALL business meetings and remember the theme for our 2000 meeting in Philadelphia – leadership.

Kathie then thanked outgoing Board Member Lori Weiss, Treasurer Claire Engel, Past Chair Anne Ellis, and Chair Glen Gustafson and presented each with a card and gift in appreciation. In addition, she gave incoming Vice-Chair/Chair-Elect Ann Jeter some change-of-address packets from the U.S. Post Office since the last four PLL chairs have changed jobs at some point during their time in office.

The meeting was adjourned at 8:44 a.m. ■

## MINUTES OF PLL 1999-2000 EXECUTIVE COMMITTEE MEETING, JULY 21, 1999, WASHINGTON, D.C.

by Holly Mohler, PLL Secretary, Long & Levit, San Francisco, CA

**K**athie Sullivan, Chair, called the meeting to order at 7:05 a.m. Those in attendance were as follows: Stephanie Paup, Anne Ellis, Glen Gustafson, Kathie Sullivan, Amy Eaton, Lee Nemcheck, Lauri Flynn, Janice Henderson, Joanne Dugan, Holly Mohler, Jan Brown, Ann Jeter, Martha Goldman, Ruth Balkin, Terry Psarras, Rachel Jones, Michael Saint-Onge, Phil Brown (guest, Global Securities), Richard Harrison (guest, Global Securities), and Kamla Hedges (guest, BNA).

After a round of introductions, Kathie stated that this would be a casual meeting, with lots of brainstorming and sharing of ideas. She also said that she plans to use e-mail heavily this year to communicate with everyone.

Kathie reported that the Board has approved a change in PLL's fiscal year.

There was a brief discussion about fund-raising for PLL and what types of items or projects we might want to take on. Public Relations Chair Amy Eaton said that she would look into this with her committee. One of the issues that must be addressed is whether sales have to go through AALL. A possible solution involving some vendor participation or funding was discussed.

Terry Psarras, speaking for the Technology Committee, reported on the planned overhaul of the PLL Web site, which will be rolled out in two phases. Phase I, which has already been started, consists of correcting and updating all the information on the Web site. The expected completion date for this is the end of the year. Phase II consists of redesigning the Web site, including both the content and the layout. The expected completion date for this is around March 2000. During the redesign period, sample pages will be loaded in a temporary location on the Web for comments. Kathie added that there is a soft deadline of September 1 for any major corrections to the PLL Web site.

Kathie spoke about the bylaws and the changes the Board is proposing. We are investigating any changes that need to be made to allow us to print the ballot in our newsletter, *PLL Perspectives*, for now, and look into e-balling for the future. There is a short deadline for this because of the notification requirements for bylaws amendments. On a related note, Kathie stated that if the AALL bylaws amendments pass, we will need to look at our own bylaws to make sure that we comply with those changes.

Rachel Jones, Newsletter Advisory Committee Chair, spoke about the newsletter, first thanking Jan Brown for all her hard work this year.

Kathie also acknowledged Rachel's hard work this year. They had lots of full-page ads, including multiple ads from both Lexis-Nexis and West Group. Plans for the upcoming year include having regular columns from PLL Groups, a regular training corner, or a winter issue devoted to training issues and best practices. Reading from Michelle Schmidt's notes, Rachel spoke of other suggestions, including a best feature article, to be selected by the Newsletter Advisory Committee, or links on our Web site to our advertisers. Kathie mentioned that AALLNET is dealing with the issue of linking to vendors from its Web site and related sites, so the committee should talk to both Tory Trotta and Jason Hinkle about this before going ahead with it. There was a brief discussion about advertising rates and the possibility of giving discounts. Rachel reported that Michelle is continuing to work with Lexis-Nexis and Westlaw to see if they will carry *PLL Perspectives*.

Kathie reported that the Mentoring Committee, chaired by Jane McMahon, will be discussing with the Grants Committee the possibility of offering grants to one or two new members to attend CONELL next year.

Stephanie Paup, Grants Committee member, reported that they will work on getting a flyer or information into the preliminary materials for next year's AALL annual meeting and will look into applying grants to PLL meetings in other cities. The idea of designing different categories for grants (i.e., CONELL, registration, travel, regional conference) will also be considered.

Kathie reminded everyone to get any ideas for possible PLL candidates to Anne Ellis, Nominations Committee chair.

Kathie reported that we will review the Strategic Plan 1997-2000 and make a two-year addendum, using our Web site to gain feedback from PLL members on possible model plans. Some of the issues to be considered are whether to continue with CAPLL and RIPLL. We will also be looking at what our relationships with outside groups, such as ALA, will be.

Kathie urged people to subscribe to the AM2000 listserv and get involved in programming for next year by talking to either Joanne Dugan or Marlowe Griffiths. August 16 is the deadline for program proposals this year.

Since we did not get through every item on the agenda, Kathie stated that she would continue this meeting virtually, via our listserv, starting next week.

The meeting was adjourned at 8:25 a.m. ■

## CITATION REFORM: A REVIEW OF AALL'S UNIVERSAL CITATION GUIDE ON TRIAL

Presented at the 92nd Annual AALL Convention, Washington, D.C.,  
by Greg McNown, Spencer Fane Britt & Browne LLP, Kansas City, MO

**T**his program presented opposing views on the issue of citation reform. Presenters included representatives from the AALL Task Force on Citation Reform, a practicing attorney, court clerks, law librarians, representatives from state legislatures and a Tenth Circuit judge. The program was coordinated by Carol Billings.

Citation reform has been around for some time now. It is based on the premise of adopting for the practice of law a vendor and medium neutral citation format, replacing the current National Reporter System (NRS) format. The broad view here is to eliminate what some would characterize as a monopolistic practice of taking public domain material and reselling it for profit. For purposes of this review, I will address only case citations. The presenters, however, also discussed statutes and administrative regulations.

Bruce Kennedy, one of the drafter's of the AALL Universal Citation Guide (UCG), made a convincing argument for adoption of the Guide. A citation composed under this Guide includes four major components. The four-digit year in which the decision was rendered is the first part of the citation. The second part is the jurisdiction in which the case was decided. The two-digit state postal abbreviations for states are used for state opinions. Appendices to the state abbreviation, such as App or County Name identify which court in the state handed down the decision. In a federal case, the jurisdiction includes US Dist, followed by the District and state abbreviation. Appellate courts are indicated by US App, followed by the number of the Circuit in parenthesis. The third part of the citation is the sequential number of the decision rendered from that jurisdiction during that calendar year. Fourth, a paragraph number indicates pin-point cites.

The simplicity of this citation format is obvious. It strips away any reference to particular publishers, and ostensibly, allows any person to access the case, regardless of the published medium.

It is apparent to me that if this UCG were to be adopted, individual states and courts would bear the cost of implementation. In other words, in order to keep the citation format vendor and medium neutral, governmental bodies, using taxpayer dollars, would need to implement and manage the publication of cases. Unfortunately, in this viewer's eyes, most states are not in a position to take on the publication and indexing of cases, in any format – electronic or print. Individual states have tried in the past to bear the costs of publishing their own cases, and most have abandoned this in favor of the NRS in order to save money and human resources. Kevin King from the Oklahoma Supreme Court was not persuasive in his summation of the transition in Oklahoma to an entirely electronic case publication

system. He downplayed the cost of implementing the system and indicated that incidental computer costs in establishing the system have not been exceedingly great and that court clerks have been receptive to the necessary tagging and indexing of individual opinions.

The other element in having individual courts handle their own publication of cases is quality control. County and state employees may have less incentive to key in accurately case information than does an outside commercial vendor. To date six states have adopted, in some format, the AALL UCG. It should be noted, however, that these states (including Maine, North and South Dakota, and Wisconsin) generate considerably less case law than other states (New York, California, Texas, etc.).

A spirited discussion ensued on the idea of using docket numbers instead of case numbers. Patrick Fisher from the Tenth Circuit Court of Appeals argued that docket numbers follow a case from cradle to grave and are unique to each case and jurisdiction. Since the docket number is issued at the inception of a case, that number can subsequently be used to retrieve case filings and any decisions rendered. Mr. Fisher rebuffed the idea that docket numbers would be hard to search. To the contrary, searching by unique docket numbers would be less likely to retrieve unrelated cases.

On the flip side of this issue are case numbers. Kent McKeever from Columbia University strongly suggested that the use of docket numbers would result in chaos, including transcription errors, lack of uniformity across jurisdictions, and compilation headaches – imagine a range of docket numbers on the spine of a book.

In my opinion, with the unique system used by each court, a case citation using a lengthy and sometimes confusing docket number that requires additional information such as the jurisdiction and date, would be a huge headache for even the hardiest of researchers. The other problem in using dockets numbers is the fact that frequently, multiple decisions are rendered from one piece of litigation – and one docket number.

It is clear that the issue of citation reform will continue to elicit strong opinions from both sides. In 1996, the ABA submitted a draft report on citation reform that closely resembles the AALL Guide. The ultimate litmus test on this issue will be the acceptance, or rejection, by the practicing bar. Major concerns about indexing, uniformity and cost remain to be fleshed out. It is clear that electronic publishing has raised an important issue regarding the citation of legal material. My hope is that rational, broad-based assessment and acceptance of any type of citation reform be accomplished before a final model is adopted, especially if it involves taxpayer monies. ■

## INDEPENDENT LAW LIBRARIANS PROGRAM IN WASHINGTON

by Ruth G. Balkin, Balkin Library & Information Services, Rochester, NY, Chair, PLL ILL SIS

### INTRODUCTION

The Independent Law Librarians' program was titled "Information IS Knowledge—The Information Specialist's Role in Developing Business for the Firm. A Case Study in Maximizing the Legal Information Specialist's Skills." The speaker was Betsy Ward Kalb of Xerox Business Services' Legal IBU (Industry Business Unit), which provides solutions and services to law firms, corporate law departments, and judicial systems.

### STEPS TO GETTING MORE BUSINESS:

Betsy first asked two questions: What is your title? What do you read?

#### Study business:

- Since Betsy's focus is the legal market, she reads publications such as: *Of Counsel*, *Wired*, *American Lawyer*, Washington, D.C. publications, and *The Wall Street Journal*.

#### Study your firm's business:

- Create a spreadsheet of clients and practice areas. Indicate billings for each client in the different practice areas of the firm.
- Select target clients. Choose clients about whom the partner feels confident, where more than one partner is involved and which have revenue growth potential.

- Focus on two clients. Form a team. Include a supportive partner, an associate, an Information Technology specialist, marketing representative, librarian.

#### Study clients' businesses:

- Use online searches to prepare a report. Who are the executives and what are they saying about the business, economics? What are the companies' financial relationships, products, and board of directors' ties? This information helps build ties on different levels.
- Who is the general counsel? In what types of litigation and/or deals are they involved? What services do they offer their company? What is their organization and staffing? What resources and training can you provide or share?
- What is the current state of their business? Analyze who works with them, what you have learned about them and their industry, where their operations are located. What opportunities exist and why? Are revenues up or down? What kinds of services can you provide?

Put together a report for your partners. Suggest what your firm can do in exchange for the opportunity to learn more about their business and to introduce other lawyers for consideration when new opportunities arise.

Don't stop here. Study and maintain your firm's relationship with its

*continued on page 16*

## THE GUMSHOE LIBRARIAN AT AALL

by Aleta Benjamin, O'Melveny & Myers, Newport Beach, CA

Each year when I receive my AALL annual meeting preliminary program, I pick up my yellow highlighter and look hopefully for a few "must see" programs. This year, one program jumped out at me with the catchy title of "Gumshoe Librarians: Using Investigative Sources and Techniques." There are so many days during which the questions I am asked make me feel like a cross between Miss Marple and Sam Spade, that this offering sounded like it was right up my alley.

The session did not disappoint. The first speaker, Joan Feldman of Computer Forensics, Inc., discussed the use of and access to electronic data, especially in litigation or civil matters. Although I was aware of some of the basics (for example, I knew when you "delete" something, it's not really gone) I did not know that many word processing programs keep all versions and revisions to a document, not just the final text. This trail can often show the train of thought in a negotiation, or reveal

comments that were thought to be internal. The materials presented greatly increased my understanding of the kinds of "electronic trails" people can leave.

The next speaker was Connie Kaplan of Kroll Associates, who made a great "gumshoe" entrance, complete with trench coat, hat, and music courtesy of Inspector Clouseau and the Pink Panther. In her talk, she shared a long list of research resources and techniques. This is always a win-win experience. If the items are all ones you are familiar with, it helps you realize and reaffirm you are up to speed in your research skills. And if there are ideas or sources that are new, what could be better than another source to add to your lists!

As more and more information piles up around us, we need to utilize any skills we can to be able to do our jobs. When it's necessary, I will now consider myself a deputy gumshoe librarian. ■

## PLL RECORDS MANAGEMENT SUBGROUP Annual Business Meeting: Agenda & Report, July 20, 1999

By Lee R. Nemchek, Morrison & Foerster, LLP, Los Angeles, CA

### INTRODUCTIONS

Eight individuals—representing private law firms, corporate legal departments and quasi-government agencies, attended the meeting. Prior to the meeting, I received e-mail communications from seven additional group members asking to be kept in the loop regarding group information and activities.

### OLD BUSINESS

- *Listserv change from legalrec-l to sis-pll-legalrec.* An informational handout reprinting Lauri Flynn's e-mail message dated May 16, 1999 was distributed.
- *Programming and booth for ALA 2000 in Denver.* Partnering with ARMA Legal ISG. A handout reprinting the group's program proposal for ALA 2000 was distributed. The program would be jointly sponsored with ARMA. We don't expect to hear about program acceptance until sometime in August or September. Possible plans to partner with ARMA International to share costs of an exhibit booth at ALA were discussed.
- *Book news; surveys.* A handout reprinting a submission for the next issue of *PLL Perspectives* regarding participation of members of the group in upcoming records management surveys was distributed. The surveys are research instruments associated with the forthcoming ARMA treatise on records management practice and procedure (due 2001).

### NEW BUSINESS

- *Election of new chair.* Motion was made and seconded to elect Lee Nemchek as new chair of group. Election was accepted.
- *Programming for AALL 2000 in Philadelphia.* Lee Nemchek distributed a draft of a program proposal submission form for the 2000 Philadelphia meeting. The proposed title of the program is "Multitasking: A Pathway to Law Firm Leadership." The final version of the proposal is now in the hands of PLL's Education Committee co-chairs.
- *Change in name and scope of group to include multitasking beyond records management.* A proposal was made to expand the focus of the group beyond records management to include multitasking private law librarians. These include those who have major administrative responsibility for designing programs for and managing areas of law firm/corporate legal department administration, in addition to records management and conflicts. The consensus of the group was that this is a very interesting proposition that deserves more discussion. We agreed to continue this discussion with the group's membership via

listserv e-mail and to try to reach a decision within three to six months. The decision will not affect our group's program proposal offering discussed above. It also will not affect plans to produce a multitasking, networking directory, discussed below.

- *Production of new membership/networking directory/salary survey.* The most recent Group directory is dated July 1996, and an updated directory is definitely needed. Since membership in PLL groups is informal and is not captured in AALL membership records, compiling a directory is problematic. Lee Nemchek has drafted a survey instrument that would capture membership information, multitasking information, demographics, and salary survey data for multitasking private law librarians (including records/conflicts managers). The issue is finding the best way to distribute the three- to four-page survey. When a final draft is complete, the survey will be submitted to the PLL Executive Board for input and comments. If this survey/research is completed within the next 11 months, the data will be available to use in preparation for the AALL 2000 program offering on multitasking, and there will be plenty of additional data available for a substantive article on the subject of multitasking by private law librarians.

Adjournment. ■

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*Independent Law Librarians Program, continued from page 14*

clients. Continue interaction. Trace revenue. Pick four top topics of interest to the client and send updates. Get your attorneys to visit the clients' sites.

Success depends on the partner's good relationship with the client. Your firm needs a good idea of what marketing is. Target one client at a time who has spent money on legal work. Study and analyze their business and what other firms do for them.

Remember that relationship building is continuous and that work flows from improved relationships. Clients and lawyers are unable to control the glut of information. Private law librarians, independents, and other consultants are in a position to take advantage of this fact and help their clients and firms grow.

The results can be spectacular. One coalition of information specialists turned a small account into a multimillion-dollar client in three years. ■

*Ruth Balkin can be reached at [rbalkin@servtech.com](mailto:rbalkin@servtech.com) or 716-482-1506.*

SCENES FROM THE PLL/SIS BUSINESS MEETING  
WASHINGTON, D.C. JULY 18, 1999



*Incoming Chair – Kathie J. Sullivan  
Outgoing Chair – Glen Gustafson*



*The generous folks from GSI*



*Executive Board Members  
Lori Weiss, Joanne Dugan, Kathie Sullivan, Holly Mohler, Anne Ellis, Glen Gustafson*

## PLL TECHNICAL SERVICES ROUNDTABLE, AALL, WASHINGTON, DC, JULY 19, 1999

by Betty Roeske, Katten, Muchin & Zavis, Chicago, IL, Chair, PLL TS Roundtable

**T**he purpose of this meeting was to inform technical services librarians of the recent announcement of the formation of LEXIS Publishing. LEXIS representatives at the meeting were Janet Collins, Acting Vice President LEXIS Publishing Marketing, Cindy Spohr, Director Librarian Relations Group, and Michael Latsko, Director of Jurisdictional Publishing Operations. Betty Roeske, Chair, PLL TS-SIS, monitored the meeting.

Cindy Spohr reported on the CRIV site visit at the LEXIS-NEXIS group headquarters in March of this year. High level LEXIS executives met with the members of the CRIV committee to discuss a variety of topics raised by CRIV and by the AALL membership. The executives and CRIV members were divided into two groups, one for online and the other for offline products. Cindy also reported that Ann Fullenkamp, Senior Vice President for Strategic Marketing at LEXIS Publishing met with academic and firm technical services librarians on May 5 in Chicago to seek their input on upcoming company changes.

At present, LEXIS Publishing is planning to create a special panel of technical services librarians to serve as a sounding board for branding strategies, which effect technical services.

Michael Latsko, from LEXIS Publishing in Charlottesville, VA, reported that teams are being formed to implement branding strategies. Teams include staff from the five companies, and in some cases, LEXIS Publishing legal counsel staff. A product packaging team was recently formed to address issues on hardcopy and CD-ROM publications. Since the impact of product packaging is of specific interest to technical services librarians, it is envisioned that this team will work closely with the special panel of librarians.

Questions and answers followed the overview presentations.

### COMMUNICATION

At LEXIS Publishing, Cindy Spohr is in charge of developing a communication plan for librarians. Do we want weekly communication? Is communication through CRIV a desired possibility? Librarians at the meeting asked to have new product notices specially prepared for and distributed to technical service librarians, and to have notice or instruction for changes sent along with the piece.

### CUSTOMER SERVICE

Additional customer service staff training for the hardcopy and CD-ROM publications will begin soon at LEXIS Publishing. Current plans include merging the customer service departments of Matthew

Bender and MICHIE within the next 18 to 24 months.

### FOREIGN IMPRINTS

No foreign imprint is involved in the formation of LEXIS Publishing.

### INVOICES

Matthew Bender and SHEPARD's invoices are already created by the same system. LEXIS Publishing is planning to make changes to the invoicing system for MICHIE to provide a consistent look and consistent policies for the Shepard's, Matthew Bender and MICHIE invoices. The company is not planning to merge accounts into one giant invoice. Customers will continue to receive three separate invoices. At some point next year, the invoices from the three companies will look the same. The Shepard's and Matthew Bender invoices will maintain the same account numbers that customers have today. Because of system constraints the MICHIE account numbers may not be completely identical. LEXIS Publishing will provide information to customers on how the account numbers change, so that they can be easily understood. In 18 to 24 months the company will have the capability to merge the three accounts but will do so only at the specific request of the customer. LEXIS Publishing will not automatically merge the three accounts into one.

At this time, LEXIS Publishing has no plans to merge the online LEXIS-NEXIS invoices with the Shepard's, Matthew Bender and MICHIE invoices.

The pros and cons of annual invoicing were discussed at the meeting. It seemed that librarians all work for different parent organizations and have different wishes and restrictions. A few librarians asked LEXIS not to put invoices in plastic wrappers.

### NAME CHANGES

SHEPARD's and Martindale-Hubbell are special names. Imprint change is being considered by LEXIS Publishing. Librarians prefer to see title change happening with a new edition. For looseleaf publications, it is acceptable to librarians that the title on title page may change without receiving a new replacement binder.

### PRICING

Librarians like to see advance notices for new prices. Some libraries cannot afford the new higher price and prefer to cancel the title before receiving any new piece. ■

*Notes taken by Lorna Tang, University of Chicago D'Angelo Law Library and Betty Roeske, Katten Muchin & Zavis.*

## LEGAL RECORDS MANAGEMENT SURVEY SERIES SCHEDULES FOR SUMMER/FALL 1999

by Lee R. Nemchek, Morrison & Foerster, LLP, Los Angeles, CA

During the summer and fall of 1999, survey data is being collected from four targeted populations within the legal records management community for inclusion in a forthcoming ARMA publication on legal records management practice and procedure. Author and PLL member Lee Nemchek CRM, along with co-writers Beth Chiaiese CRM and Jean Barr CRM, are using the current ARMA Legal Industry Specific Group membership roster as a starting point for directed mailings. Those of you who are members of ARMA's Legal ISG will receive at least one survey instrument. Others of you may be contacted to schedule an interview in person or by telephone. The four targeted populations are as follows:

1. Canadian Law Firms: survey on conflicts of interest and client/matter intake in Canada
2. U.S. and Canadian Law Firms: survey on vital records and records retention issues
3. U.S. and Canadian Corporate Law Departments: general survey on records management procedures in corporate law departments
4. U.S. and Canadian Judiciary: general survey on court records management procedures

The surveys are also being publicized on various listservs – including recmgmt, legalrec, ARMA-Canada, and lawfirmadmin – and here in *PLL Perspectives*, in an effort to capture data from legal records managers who are not ARMA Legal ISG members.

The focus of the forthcoming publication, which is scheduled for release late in the year 2000, is on best practices for the field of legal

records management and not on survey data. However, in order to recommend a “best practice,” it is necessary to be aware of the full universe of available choices. The primary purpose of the surveys is to gather information in areas where current information is scarce and/or difficult to acquire. Consequently, your survey responses are very important.

The Canadian conflicts survey was released during the week of June 21; the other three are due for release by the end of the summer or early fall. Please look for surveys in the mail and complete and return them by the deadline requested. If you are an American or Canadian Legal ISG member working as a records manager in a private law firm or corporate legal department and you do not receive a survey instrument prior to November 1, 1999, contact Lee Nemchek via one of the contact points listed below. If you are a member of PLL's Records Management Group but are not an ARMA Legal ISG member and you would like to participate in one or more of the targeted surveys, contact Lee Nemchek and provide your name, place of employment and mailing address. A survey instrument will promptly be mailed to you. Your participation in this project, which will contribute to the success of an important new reference tool for our industry, is greatly appreciated. ■

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