

# PLL PERSPECTIVES

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

VOLUME 8 ISSUE 3

[ SPRING 1997 ]

## THE PLL STRATEGIC PLAN 1997-2000

### EDITOR'S FORWARD

**T**HIS IS AN EXCITING ISSUE of *PLL Perspectives* because in it we present the PLL STRATEGIC PLAN. The Plan was drawn up after an intensive weekend of discussion last November by the executive committee and AALL leaders who met in Dallas. They have worked very hard and are eager to make the Plan available to the members as soon as possible.

To begin, JoAn Segal, facilitator for the meeting, describes the process by which the plan was developed. She discusses the means by which the specific initiatives outlined in the plan itself were developed: the formation of the mission statements, the determining of values and criteria and finally the list of activities from which the final initiatives were derived. The plan itself follows with its list of six strategic initiatives and the short, medium, long range and ongoing means of implementation for each. Because of space limitations, the Plan is presented in a somewhat abridged form, but the substance is here; and the full text is available on the web site or upon request from AALL headquarters. There is a response form at the end of the Plan, and all members are encouraged to complete it and return it to Anne Ellis.

All of us are struggling with our changing roles, the impact of technology, the evolving formats for information retrieval and the perceptions and misperceptions of our administrators and firms which are often combined with cutbacks in budgets, staff or space. It often seems impossible to keep up on all fronts. The activities outlined in this plan provide specific means of helping up to cope with these changes, increase our expertise in important ways and thus present ourselves to our employers in a positive and relevant way.

This is an important and exciting document. The six strategic initiatives set forward provide opportunities for all of us not only to benefit but also to contribute. In future issues of *PLL PERSPECTIVES* we hope to profile different aspects of the strategic initiatives. At present, I encourage everyone to read the Plan, to consider it carefully, to return the response forms and to participate in this valuable effort to enrich both our profession and ourselves as law librarians.

### INTRODUCTION TO THE PLL STRATEGIC PLAN

**S**INCE ITS INCEPTION IN 1977, the Private Law Libraries Special Interest Section (PLL/SIS) of the American Association of Law Libraries (AALL) has sought to improve the quality and service of private law libraries by emphasizing their goals, needs and special interests, and to represent those interests and concerns within AALL and the larger community. With almost 1700 firm, corporate and independent librarian members, it is the largest special interest section of AALL. In fact, more than one-third of all AALL members belong to the PLL/SIS, making it a powerful force in the profession and within the legal community.

As anyone connected with the industry can attest, the practice of law has undergone radical changes in the last ten years;

and that, in turn, has radically affected the private law librarian. Outsourcing, budgetary constraints, space reduction, technology, the ever-changing face of the legal publishing industry — all of these challenge our members, and in turn challenge AALL and PLL to respond to these changes through educational programming and the development of resources to help our members sharpen their skills and give them the tools they need to succeed.

While the PLL/SIS has always been extremely active, we have never before developed a strategic plan. This meant that we were choosing projects and making decisions without periodically stepping back to look at the big picture, an exercise that takes on even more importance as the environment changes rapidly. It also meant that we had nothing

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## FROM THE CHAIR

by Michael Saint-Onge  
Coudert Brothers, San Francisco, CA

I CAN'T HELP IT. I AM A BORN OPTIMIST. I always have been. When all around me see gloom and doom, I see light on the horizon. It sounds silly, I know, especially in these trying times. In defense of us optimists, though, I must say that optimism is not the same as naivete. Naivete is when you fail to notice the dark clouds — a little like living in your own world. Optimism is when you acknowledge the clouds and sometimes even get drenched in the downpour, but you know in your heart of hearts that the darkness won't last forever, that the rain isn't the final word.

I feel that way about law librarianship. While some of my colleagues wring their hands and fret about the end of our profession as we know it, I can't help but find that reaction just a little overdramatic. It is true that we're living in a strange new world, but I have to admit that I find it a little exciting. They say we might find ourselves obsolete, the "buggy-whip manufacturers" of the twenty-first century, but I don't believe it, not for a minute. After all, I've heard the stories some of my colleagues tell about life in the trenches. I hear the passion in their voices. Too many of us love what we do to surrender. Too many of us are willing to change, adapt and survive. I have too much faith in the strength of the whole — We're simply too smart and too savvy to let the future slip away.

That doesn't mean we won't have to fight like hell for it. It doesn't mean we can rest on our laurels, certain that our administrators and partners will recognize our value and simply bestow power and riches on us. It will come because we've seized every opportunity to market ourselves. It will happen because we've kept our skills up to date, networked, strategized and made it happen. Sweat equity, as they say.

That also doesn't mean that bad things can't happen to us as individuals, despite the investment. I am convinced that the librarians at the Chicago office of Baker & McKensie were competent, capable librarians; and they obviously thought they were

doing a good job of marketing. While economics may have won that battle, I know we're going to win the war. The librarians involved picked themselves up and moved on. All of them have found work, presumably, and now they know that, even though there are no guarantees, there are things they can do to lessen the chances of it happening again. I think we've all learned something from the experience, and the profession took a giant step forward.

I also think that the future of legal publishing isn't quite as awful as it looks right now, despite what you read on law-lib. (See, I told you I'm an optimist!) I do know that complaining about the situation and finger-pointing contributes little to the discussion. We have a wealth of knowledge and insight as a profession, and the problem is not insurmountable. In fact, creative dialogue is happening as we speak, and I believe that, with all of us working together, we can find a solution to the problems.

I am also energized by the work of the PLL/SIS. With the new strategic plan, and the efforts we've made to forge strategic partnerships, we are definitely moving in the right direction — even if the results might not be readily apparent. Rubem Alves, in one of my favorite poems, "Tomorrow's Child," calls this phenomenon "planting dates." Apparently it takes generations for palm trees to mature enough to bear fruit. Planting them today is an investment in the future — trusting that someone down the line will be nourished and sustained because of the effort we make now. If it is true for dates, it is certainly true for law librarianship. We are laying the groundwork, preparing the soil for the planting. The results might not be immediate, but just knowing that someone may benefit from our work makes the digging just a little easier. We might never taste the fruit, but someone will. That's good enough for me.

I don't expect everyone to be an optimist, and I'll certainly respect your right to predict disaster. I just don't believe it. After all, I think I see the sun coming up.

*continued from page 1*

against which to measure our successes and failures as an association. As with most all-volunteer organizations, long-range planning is tough to accomplish, for a number of reasons. First, it requires a certain amount of continuity. PLL leaders rotate through the Executive Committee rather quickly, each with his or her own agenda, and it becomes difficult to sustain the momentum necessary to see the project through to completion. In addition, our myriad projects have been so time-consuming that it has been difficult to find the time necessary for strategic planning. And finally, with the Executive Committee members spread across the U.S., the only opportunity for face-to-face interaction has been once a year at the AALL Annual Meeting, time which is already loaded with activity. Recognizing that the only way to actually carry out strategic planning was to carve out the time to do it, the Executive Committee of PLL met in Dallas in the first part of November of 1996. Out of that came this plan.

In this special issue<sup>1</sup>, the first component is an article on the process, written by JoAn Segal, our facilitator for the strategic planning session. This accurately describes the way we arrived at the results. Coming up with ideas has never been difficult for the leadership of this organization. What was lacking, at least in our estimation, was a theoretical framework - a list of ultimate goals that we wanted to achieve, and a list of criteria out of which we might choose our activities more carefully. After this process, we identified 26 activities that would help us attain our goals. Out of those, we identified the ones we thought we could accomplish, given the limited amount of time, money, and energy.

The second component to the plan is the list of activities on which we would like to focus, including where these fell in regard to the vision statements we crafted, and the time line for implementation. This is the heart of the plan itself, and we urge you to read it over several times and to talk about it with your colleagues. Ask yourself: "How will these activities affect my ability to do my job? How will I be better off at the end of the plan than I am now?"

Also included in this issue is a response form. We are interested in input from our membership which can help direct and shape our next plan. As with all strategic plans, this is a work in progress, to be fine-tuned and adjusted as we progress. While these are the areas that we've identified as important, there is, of course, always room for discussion and comment. In fact, we welcome the opportunity to discuss this plan with the membership and listen to their concerns. We also would like to use it as a checklist, of sorts, against which we can measure, at the end of the allotted time, our successes or failures. We hope that future PLL Executive Committees will continue to build on this document, and that it will be regularly compared and contrasted to the Strategic Challenge that is developed by AALL, (which is on a different planning cycle) to make certain that our activities both flow from, and inspire, our parent organization's planning.

On that note, the PLL Executive Committee would like to thank Roger Parent, AALL Executive Director, for his encour-

<sup>1</sup>There are several other parts to the complete plan, but space limitations require that we condense some of it for this issue of *PLL Perspectives*. A complete copy of the plan will be posted to our Webpage, and is available by request from AALL Headquarters

agement to "think outside the box" and his commitment to the PLL; Frank Houdek, AALL President, and Tory Trotta, AALL Executive Board Member (and Chair of the AALL Long-Range Planning Committee) for their assistance with formulating the plan and helping us put it in the larger context of AALL; and JoAn Segal, our facilitator, who carried us through to the end with unfailing enthusiasm. To the extent that the plan shines, it is due in no small part to the involvement of these individuals.

One last comment: while the PLL Executive Committee has identified these projects as ones toward which we should be working, it is the responsibility of each one of us, as members, to make them a reality. Private law librarians are working in a challenging environment, under difficult circumstances. We need each and every one of us to contribute to this organization to the best of our ability in order to keep it responsive to the ever-changing needs of the marketplace. We have a tremendous amount at stake, and if we are to succeed in our task, we need you.

Michael Saint-Onge, *Chair*  
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 Mary Smith Forman, *Past Chair*  
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 Jean O'Grady, *Secretary*  
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 Karl Gruben, *Board Member*

## THE PROCESS

Leaders of the American Association of Law Libraries (AALL) and of the Private Law Libraries Special Interest Section (PLL/SIS) met in Dallas, November 9-11, 1996 to decide on activities the SIS should undertake in the next 3-4 years. Specifically, the session had the following objectives:

- Describe and evaluate the environment in which private law librarians and the PLL/SIS are operating
- Ensure all participants were in agreement about the process
- Identify values and criteria for selecting activities
- Select specific activities
- Plan for implementation

Participants included: PLL Executive Committee members Michael Saint-Onge, Chair; Mary Smith Forman, Past Chair; Anne Ellis, Chair-Elect; Joan Jarosek, Treasurer; Jean O'Grady, Secretary; Karl Gruben, Board Member; Frank Houdek, AALL President; Tory Trotta, AALL Board Member; Roger Parent, AALL Executive Director; and JoAn Segal, Facilitator. Local arrangements were handled by Joan Jarosek, PLL Treasurer and hostess for the meeting at Jones, Day, Reavis & Pogue. The meeting began at 2:00 p.m.

The first session began with an informal dialogue on the environment in which legal information professionals work. This continued with discussion of PLL and its place within AALL. Some of the challenges mentioned by the participants included con-

stant change, technological developments, budgetary constraints, Administrators' belief that technology can reduce the need for librarians, the pressure to reduce costs, the threat of outsourcing, and lawyers judging themselves capable of doing their own research using the Internet.

The group members also discussed the unique environment of a law firm or corporate law library. Law librarians are competing with lawyers and other departments for resources. Key issues included the unrealistic expectations of administrations and clients who believe that technology will reduce costs and increase productivity and profitability and that "everything is on the Web." There are wide differences in technological knowledge among clients which impacts how research is done and its cost-effectiveness. Spiraling book costs and the consolidation of the legal publishing industry are also of great concern. It is difficult to communicate to lawyers that the same product in different media may be quite different in content and searching methods. The group concluded that forming partnerships with lawyers and MIS staff is an effective means for implementing new technologies for library services. Librarians offer their unique perspective on print versus online contents.

Although participants agreed library services are in great demand, the resources needed to maintain and expand services come only with marketing and promotion of the library. In addition, librarians feel great pressure to stay abreast of technological developments. It is of great concern that the time to accomplish such is lacking. Further pressure is felt as librarians' roles are expanding with the explosion of information. Librarians struggle to provide quality information services as library staffs may not possess the increasing skills needed to implement such service. The increased work pace and the resulting stress on the library staff must be addressed. Librarians need to examine how to manage these competing forces of work life.

*Most significantly, the group developed five vision statements, describing a desirable future, as follows:*

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

#### VALUES

To set the stage for the planning activities of the next two days, the group examined the values and criteria that underlie their work. Identifying values was the more difficult task, but the

group members agreed upon the following:

- Answering the needs of diverse librarians
- Empowerment of law librarians as professionals
- Quality of work life
- Values consistent with those of AALL
- Proactiveness
- The assurance of jobs and creation of a sense of community, especially for solo librarians
- The prudent use of resources
- Enhancement of value for members

#### CRITERIA

Participants then addressed criteria which would be used to select the specific activities. After generating a long list of possible criteria, the group decided to give preference to activities that

- Benefit the largest number of people
- Require resources that are available
- Realize goals within the allotted timeline
- Achieve goals relevant to the members' point of view

On Sunday morning, the group reconvened to discuss ideas for specific activities that might be undertaken. Using the vision statements as the driving stimulus, the participants generated a list of twenty-six activities, many of which had several parts. Each activity was designed to lead to one or more of the vision statements and discussion was very lively and exciting. Refinement continued as the group identified interested parties outside of PLL and matched up activities with the various vision statements.

Selecting a list of activities consistent with the criteria and setting a priority on the activities occupied the group on Monday. A chart was prepared using the five vision statements mentioned above, with activities pertinent to each. Participants then initialed three top-priority items under each vision statement. As a result of this prioritizing effort, six groups of activities emerged as being of highest priority. (For these results, see "The Plan — Overview") In addition, two activities were identified as ongoing, but requiring prompt attention from the Executive Committee.

Next, the group addressed specific implementation steps for each of the high-priority activities and pinpointed a time frame in which these could be accomplished. This work produced the most significant document: "Activities of Highest Priority 1997-2000."

The last step was to decide how to present the plan to the members and to try to predict some obstacles that might arise and how to overcome them. The planning group was very eager to inform the members about their work and to begin to involve them in implementing the immediate priority activities. In addition to articles in PLL Perspectives, it was decided use of the web page and listserve would facilitate communication of the plan itself. Copies of the report would be made available in a variety of formats. The need for immediate development efforts and for securing funding for the various tasks was recognized.

Optimistic at the end of three days' successful work, the group acknowledged that the biggest obstacles were the need for financial and human resources to carry out the complex and difficult

tasks. However, the Executive Committee was confident that PLL/SIS would be able to provide even more meaningful services for law librarians.

JoAn Segal  
*PLL/SIS Strategic Planning*  
*Session Facilitator*

## THE PLAN

### OVERVIEW

Our five "vision statements" were the guiding principles for the selection of activities. We wanted to choose projects that would advance these goals, that would have a real impact on the future of the private law librarian and for our profession as a whole. Out of these projects, we found that we were drawn to six "sets" of activities, with each addressing at least one of these statements. The six sets of activities are:

1. Marketing the tool kit.
2. Activities which address consumers and publishers (a combination of a number of activities that appeared on our initial list).
3. Research on the Value of the Law Librarian.
4. Research/Information Handbook (RIPLL).
5. Targeting Employers (Lawyers and Administrators).
6. Sharing Best Practices.

We felt that these six activities also met our other criteria: they benefitted the largest number of people, they required resources that are or can be made available, they can be accomplished within the allotted amount of time, and they are relevant from the member's point of view.

Each of these six items had a number of parts, each with different time lines: immediate, medium-range, long-range, and ongoing. Following you will find "Activities of Highest Priority 1997-2000," which outlines the activities by project.

## ACTIVITIES OF HIGHEST PRIORITY 1997-2000

### I. MARKETING THE TOOLKIT

**Initiative:** We recognize that the AALL Tool Kit is a valuable aid in promoting the value of law librarians. Since this has already been created, we need to find ways to get it into the hands of the membership.

**Implementation:**

*Ongoing*

1. Distribute order forms at Association of Legal Administrators' (ALA) Meeting.
2. Place ads in prominent legal and library periodicals/journals.

3. Solicit articles on successful use of the tool kit.
4. Send complimentary copies of the tool kit to the heads of law and library related organizations, especially the "Management Briefing Section" of the kit.
5. Get a review of the tool kit published in Legal Information Alert, and/or Trends in Law Library Management and Technology.
6. Promote it in AALL Spectrum and PLL Perspectives.
7. Use the PLL listserv and Webpage to get the word out.

### II. CONSUMERS AND PUBLISHERS

**Initiative:** We know that our institutions are ultimately concerned with the bottom line. We would like to respond to those concerns by focusing on ways we can educate our membership to become better consumers. We would like to provide consumer information in detail - how much we spend on pocket parts and supplements for each title, % increase in price, etc., so that our members can make informed decisions. We would also like to provide product reviews and comparisons. In addition, we would like to become consumer advocates for librarian interests, partnering with information providers to ensure that librarian input is being solicited.

**Implementation:**

*Immediate*

1. Appoint a PLL Consumer Advocacy Committee, linked to CRIV.
2. Establish a Consumer Alert Column in *PLL Perspectives*.
  - a. How to be a wise consumer.
  - b. How PLL can act as a consumer advocate.
3. Begin product reviews in *PLL Perspectives*.
4. Consider folding additional information into Price Index to Legal Titles:
  - a. Track information in detail such as cost of pocket parts, supplements, including % increase for each title.
  - b. Track information in detail about publisher's average increase in costs for these items.
  - c. Track according to subject area.

*Medium*

1. Gather long term price change information. Use (or create, if necessary) a software package to help us document these changes.
2. Publish articles in periodicals geared toward the practicing bar and/or firm administrators to reinforce the idea that private law librarians are involved in shaping publishers' products, services and costs.

*Long*

1. Put the consumer information/product reviews on our webpage.
2. Encourage other organizations' webpages to link to ours, so that they will begin to see us as the "experts" in legal information resources.

### III. RESEARCH ON THE VALUE OF THE LAW LIBRARIAN

**Initiative:** Research is needed on how we as librarians are being perceived in our institutions, similar to the Matarazzo study by SLA entitled, "The Value of Corporate Libraries: Findings from a 1995 Survey of Senior Management." Once we know how we are being perceived by lawyers, managing partners and by law firm administrators, we can respond with appropriate educational materials and programs. It will also allow us to measure success or failure in changing that perception in future studies of this sort.

**Implementation:**

*Immediate*

1. Find out about available monies.
2. Appoint a committee to draft plan and carry it out.

*Medium*

1. Solicit funds from other sources as back up to the project.
2. Publish article in PLL Perspectives on earlier research (including information on the Matarazzo Survey.)

*Long*

1. Conduct the survey.
2. Report the results.
3. Evaluate the findings and use this information in future strategic plans.

### IV. RESOURCES/INFORMATION (RIPLL)

**Initiative:** We recognize that our membership is varied, but that there are some reoccurring requests for practical information that would be helpful to get into our members' hands. We talked about compiling this information into a notebook, and we called this handbook, "Resources/Information in Private Law Librarianship," or "RIPLL."

**Implementation:**

*Immediate*

1. Establish a PLL committee to carry this forward.
2. Establish an Editorial Advisory Board.
3. Seek vendor support for start-up costs, but no editorial input from vendors.

*Medium*

1. Use the listserve to find out what is relevant to the members.
2. Generate discussion on the listserve to help identify info/resources for inclusion in RIPLL.
3. Establish a rough outline of the handbook.

*Long*

1. Prepare a marketing plan.
2. Implement a possible subscription plan or standing order for updates.
3. Publish RIPLL.

**V. TARGET EMPLOYERS  
(LAWYERS AND ADMINISTRATORS)**

**Initiative:** We identified the need to “get the word out” on the value of professional law librarians to decision makers in our firms. Part of the challenge of this project is to “meet them where they live,” to find ways to present our skills to them in a variety of formats and to establish ourselves as the experts in legal information resources.

**Implementation:**  
*Immediate*

1. Pull-out section in PLL Perspectives.
  - a. “Give-to-your-boss” sections addressing areas of interest to them.
  - b. Should appear 1-2 times a year.
  - c. First one should be on cost-control and what PLL is doing.
  - d. Have extra copies available for sale /distribution.
2. Begin to develop other materials we can use to educate employers, distribute at ALA, ABA/LPM meetings, etc.
3. Support an official representative to the ABA Law Practice Management Section.

*Medium*

1. Work to make our website relevant to what they do, so they will access our site and begin to see us as the information experts.
2. Publish in their journals relevant, high-quality articles.

*Long*

1. Develop educational programming proposals for ALA and for the ABA/LPM annual meetings.
2. Serve on committees or serve as resource personnel to these organizations.

**VI. SHARE BEST PRACTICES**

**Initiative:** With 1700 members, we have a great deal of collected wisdom. Wouldn't it be great if we could tap into that resource to do practical problem-solving? Sharing best practices could take place in a variety of formats on a variety of topics.

**Implementation:**  
*Immediate*

1. Annual conference.
  - a. Conduct face-to-face meetings in town hall setting.
  - b. Present a component of PLL program, similar to “hot topic.”
2. Initiate discussions on the listserv, with input from members on how they solved the problem or dealt with the situation.

*Medium*

1. Produce an electronic town hall meeting (with limited participation) on best practices, similar to the roundtable discussion that appeared in AALL Spectrum.
2. Create a moderated open discussion on selected topics on the listserv.

**CONCLUSION**

Strategic planning is hard work. It takes a thorough knowledge of where we have been, a firm grasp on the challenges we face, and a sense of where we would like to be as individuals, as an association, and as a profession. It is two parts history book, and one part crystal ball. But the hard work can pay off. The PLL/SIS now has a set of activities that we can work to accomplish.

We are excited about this plan and the fruit it will ultimately bear. We urge you to join in to make it a reality. Attached you will find a Strategic Plan Response Form. We encourage your feedback.

**PLL/SIS RESPONSE FORM** *Use additional sheets, if necessary.*

1. What is your general assessment of the PLL Strategic Plan and the priorities that have been set for the PLL/SIS through the activities and initiatives?
2. Are there any of the strategic initiatives that in your view require higher priority?
3. Are there any areas of concern that you feel are not represented by the current Strategic Plan? Please elaborate.

*I would be interested in working in this specific task as set out in the plan:* \_\_\_\_\_

*Please contact to discuss this further*

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

*Return this questionnaire to: Anne Ellis, Holme Roberts & Owen, 1700 Lincoln Street, Suite 4100, Denver, CO 80203.*

*Phone: 303/866-0212 Fax: 303/866-0200 E-Mail: ellisa@hro.com*

## PLL IN BALTIMORE

by Anne V. Ellis, PLL  
Vice-Chair/Chair-Elect

Holme, Roberts & Owen, Denver, CO

**W**E ARE STILL A FEW MONTHS AWAY FROM OUR BALTIMORE MEETING. However, the planning for PLL Sunday and the programs we will present has taken place during the fall and winter. Aimee Ruzicka's Education Committee has prepared seven, innovative programs for Baltimore. And, as you can see from the schedule that follows, PLL Sunday will be a busy time. By popular demand, several of the groups are hosting both a business meeting and a program this year.

Our luncheon speaker will be Pat Wagner from Denver. Pat is co-owner of Pattern Research, a 15 year old information services company in Denver. She is an active marketing consultant who conducts about 120 programs per year and speaks to all types of librarians throughout the country. Her theme will be "Everyday Leadership," which encompasses the use of vision-based marketing.

We will also have a town meeting after the luncheon to share ideas on the direction of PLL after the writing of our first strategic plan. As you can see in this issue, the plan is ambitious and needs the support of the PLL membership to succeed. The town meeting is a direct result of the PLL Executive Committee's desire to solicit the needs and comments of our 1700 members on the plan. Since the plan focuses on new initiatives, the opportunities to volunteer and make a difference are abundant. If you would like to work on any of these exciting plans or if you have creative ideas to help implement the plan, please contact me:

Anne V. Ellis  
Holme Roberts & Owen  
1700 Lincoln, Suite 4100  
Denver, CO 80203  
303-866-0212  
303-866-0200  
ellisa@hro.com

I look forward to hearing from you both before and after our town meeting. Mark your calendars now for a lot of gathering, education, networking and fun. July is just around the corner!

### SATURDAY, JULY 19, 1997

5:00-6:30 PLL Executive Committee Meeting  
1996-97

Contact: Mike Saint-Onge

### SUNDAY, JULY 20, 1997

9:00-10:00 Records Management Group Meeting  
Contact: Jeanne Reynolds

9:00-10:00 Independents Group Business Meeting  
Contact: Dottie McCaughy

10:00-12:00 PLL Business Meeting  
Contact: Anne Ellis

12:00-1:30 PLL Luncheon and Speaker - Pat Wagner  
Contact: Anne Ellis

1:30-2:30 PLL Town Meeting  
Contact: Anne Ellis

2:30-4:00 Newsletter Advisory Committee Meeting  
Contact: Susanne Zumbro

2:30-4:00 Intellectual Property Group Meeting  
Contact: Jane Moberg

2:30-4:00 Corporate Group Meeting  
Contact: Aimee Ruzicka

2:30-4:00 Independents Group Program: "Current  
Issues of Independent Law Librarianship"  
Contact: Dottie McCaughy

2:30-4:00 Technical Services Group Meeting  
Contact: Betty Roeske

2:30-4:30 Records Management Group Program  
"Information Exchange"  
Contact: Jeanne Reynolds

4:00-5:00 Education Committee Meeting  
Contacts: Tom Duggan and Nancy Adams

4:00-5:30 PLL Executive Committee Meeting  
1997-1998  
Contact: Anne Ellis

### THURSDAY, JULY 24, 1997

8:00-9:00 PLL Executive Committee Breakfast  
1997 - 1998  
Contact: Anne Ellis

## CATCH THE WAVE & SURF THROUGH THESE PLL BALTIMORE PROGRAMS

By Aimee T. Ruzicka  
Chubb Group, Warren, NJ

### WHEN CYBERSPACE MEETS PHYSICAL SPACE: LIBRARY DESIGN IN THE AGE OF TECHNOLOGY

An architect, law library consultant and practicing law librarian will discuss the impact of technology on library operations and consequences for library design. You will develop a basis for working with outside staff involved in construction or remodeling.

### SHIFTING CURRENTS: FROM THE WORLD WIDE WEB TO YOUR OWN INTRANET

Listen as a law firm, corporate law librarian and MIS expert discuss the creation of an intranet; learn how to position the library for maximum visibility on it. This program fills the SIS-designated slot.

### FROM THEN UNTIL NOW: THE MORPHING\* OF LAW LIBRARIANS INTO NEW AND DIFFERENT POSITIONS

How are members of our profession successfully filling jobs outside the law library and which skills you already have will transfer easily? Even if you don't want to morph (yet), it may be wise to think about it. (\*from metamorphosis: a marked change)

### SURFING THE INTERNET FOR PATENT INFORMATION

What are the best sites for intellectual property legal primary and technical materials? Speakers will answer this question and analyze the sites for law-related research in areas such as licensing, mergers & acquisitions, client prospecting and more.

### NAVIGATING THE WATERS FOR A DISAPPEARING ART FORM: LEGISLATIVE HISTORIES

Become acquainted or reacquainted with the disappearing art of compiling Legislative Histories. Experienced law librarians will discuss the importance of compiling these histories in-house including use of computer assisted techniques.

### DROWNING IN LIBRARY PROCEDURES? COME TO THE SURFACE AND WRITE THAT PROCEDURES MANUAL!

Don't feel guilty if you don't have a procedures manual! Attend this program and find out how to put one together, what to include, and how to keep this manual current without making it your life's work.

### COVERING ALL THE FRONTS: MANAGING MULTI-LOCATION LIBRARIES

Whether you are the manager or the "managed", this program will help you analyze management issues for the headquarters library or the branch. You will learn how to deal effectively with decision-making, communication, resource allocation and more.

## AALL MENTOR PROJECT

by Diane Gates  
Latham & Watkins, Los Angeles, CA

**T**HE PLL MENTORING COMMITTEE invites your participation in the AALL Mentor Project. We always need more PLL mentor volunteers, and we like to have extra mentors waiting to be matched as needed. The AALL Mentor Project form will NOT appear in the Spectrum this year, so we encourage you to sign up now by sending me an e-mail or fax:

Diane Gates  
Chair, PLL Mentoring Committee  
Latham & Watkins  
Los Angeles  
diane.gates@lw.com [i.e. LW.COM]  
FAX (213) 891-8763

The purposes of the Mentor Project are three-fold: to provide an informal, personal source of information for newer members; to provide an avenue by which experienced law librarians (Mentors) may meet promising new members of the profession; and to provide a network for members who are contemplating a move to another type of law library.

The Mentor Project is open to librarians from all types of libraries. Each participant will be assigned to a member whose profile matches, as closely as possible, his or her request. Applications will be reviewed by the Committee on Mentoring, Retention and CONELL, which includes representatives from a wide range of employer categories.

Listed below are a few things that you may want to do if you wish to participate. The list should serve as a guide to the many possibilities. It is by no means exhaustive; in fact, should you try to do everything mentioned, you would certainly be exhausted. With that caveat, may we encourage you to be creative. There are a great many activities which will contribute to an enjoyable experience.

### TIPS FOR LONG DISTANCE MENTORING

1. Contact your mentee by telephone, e-mail, or regular mail.
2. Ask what he or she would like a mentor to do.
3. Contact your mentee regularly throughout the year or when you have an item of information you think might be of interest or answer a need.
4. Encourage him or her to join any of the SISs or local chapters for the information the newsletters may have and to get involved. If you know of any good people to get to know in their local area, recommend doing so and perhaps drop a word yourself about your mentee to those people.

### TIPS FOR LOCAL MENTORING

1. Have coffee or lunch together or invite your mentee

- to your office for a few minutes just to chat.
- 2. Give a tour of your library and talk about library services and departments.
- 3. Invite your mentee to a local function, educational or professional meeting.
- 4. Call a few of your friends and ask if they would be willing to meet with your mentee for brief informational meetings about law libraries in the area.
- 5. Invite your mentee to call or e-mail you occasionally with questions or when needs arise.

**MENTORING AT THE AALL ANNUAL MEETING**

When you pick up your registration packet, be sure to ask for a pink Mentor Project ribbon to attach to your name badge. The ribbons will help each of us to identify other members of our very special group.

- 1. Contact your mentee before the Annual Meeting to establish some common interests in advance. Arrange to meet at the CONELL Marketplace or at some other time early in the convention. There will also be a message board in the registration area

- which can be used to exchange hotel telephone numbers, etc.
- 2. Attend at least one social event together. The President's Lunch on Monday is often a good place to meet. Try to sit with colleagues you know who are also in the mentees desired mentee/mentor matching category.
- 3. Attend a substantive program (or two) together.
- 4. Attend the business meetings together.
- 5. Plan some unstructured time just to talk. Some mentors like to treat their mentees to lunch or dinner.
- 6. Go through the exhibit hall together. Meeting vendors and representatives is often as valuable as meeting colleagues from other libraries.
- 7. Mentors who chair committees or who speak at programs should invite mentees to attend.
- 8. Mentors should remember to introduce mentees to everyone they meet, particularly the more famous members of AALL.
- 9. If you enjoy your time at the Annual Meeting, keep in touch.

**AALL MENTOR PROJECT APPLICATION**

NAME \_\_\_\_\_ TITLE \_\_\_\_\_  
 FIRM/INSTITUTION \_\_\_\_\_  
 ADDRESS \_\_\_\_\_  
 TELEPHONE \_\_\_\_\_ E-MAIL ADDRESS \_\_\_\_\_

- I want to be a mentor       I want to be a mentee

*Mentors/Mentees can either fill out the following or contact the committee representatives (listed at the end) with their selections or for further information.*

I want to be matched according to (Check all that apply) **MINORITY CATEGORY:**  African-American  Asian/Pacific Islander  
 Hispanic  Native American  Gay/Lesbian  Other \_\_\_\_\_

**EMPLOYER CATEGORY:** If you are applying to be a mentor and you have worked in more than one type of library, mark, P by the type(s) of libraries you have worked for in the past and N by the type of library you work in now. If you are applying to be a mentee and are contemplating a move to another type of library, mark N by the type of library you work in now and F by the type of library you hope to move to in the future.

- Corporate  Government  Law Firm  Student  Court  Independent  Law School  
 Other \_\_\_\_\_

- JOB CATEGORY:**  Acquisitions  Administration  Cataloging  Circulation  Computer Services  
 Foreign/International Law  Government Documents  Interlibrary Loan  Micrographics/Audiovisual  
 Public Services  Reference  Serials  Technical Services  Other \_\_\_\_\_

How long have you been a member of AALL? \_\_\_ years. Are you planning to attend the Annual Meeting? \_\_\_\_\_

Please mark the characteristic that is most important in your Mentor Project Partner:

- Same minority category  Same job category  Same employer category  Same geographic area

*Please return an answer by June 1, 1997 to one of the following committee members:*

**BY FAX** to Karen Moss, U.S. Court of Appeals Library, 1st Circuit, Boston MA Phone [(617) 223-9044] FAX (617) 223-9047  
**OR BY E-MAIL TO:** Pam Deemer, Emory University Law Library, Atlanta GA [(404) 727-0850] libped@law.emory.edu  
 Diane Gates, Latham & Watkins, Los Angeles CA [(213) 891-8457] diane.gates@lw.com  
 Leslie A. Lee, George Washington University, Jacob Burns Law Library, Washington, D.C.  
 [(202) 994-2385] llee@burns.nlc.gwe.edu

**PLL PARTICIPATING IN 1997  
ASSOCIATION OF LEGAL  
ADMINISTRATORS MEETING IN  
SEATTLE**

by Mary Smith Forman  
USAA Corporate Library, San Antonio, TX

**P**LL WILL, ONCE AGAIN, have an exhibit booth at the upcoming ALA Meeting. From May 19-21, nearly 1,500 decision makers from law firms and legal departments worldwide will gather in Seattle. PLL Public Relations Committee Chair, Barbara Cornwell Holt of Preston Gates & Ellis, along with Christy Leith of Davis Wright Tremaine are heading up the exhibit effort being handled by our Seattle colleagues.

In addition, PLL will host a one and a half hour vendor workshop on Wednesday morning, May 21. A panel of law librarians will discuss the value of law librarians to the firm or corporation's bottom line, carrying forward a theme from the AALL Task Force on the Value of Law Librarians in the Information Age work during 1996. Speakers at this program will be PLL Vice Chair/Chair-Elect Anne Ellis, who is Senior Librarian at Holme Roberts & Owen LLP, Jean Holcomb, Law Librarian and Director of the King County Law Library, and Penny Hazelton, Professor of Law and Law Librarian at the University of Washington Gallagher Law Library.

**PLL/SIS SLATE  
OF CANDIDATES  
1997-1998**

**VICE CHAIR/CHAIR-ELECT**

GLEN GUSTAFSON  
Sheppard, Mullin, Richter & Hampton, Los Angeles, CA

MAUREEN T. KAYS  
Bond, Shoeneck & King, Syracuse, NY

**TREASURER**

CLAIRE ENGEL  
Nelson Mullins Riley & Scarborough, Columbia, SC

MARY F. KOSHOLLEK  
von Briesen & Purtell, Milwaukee, WI

**BOARD MEMBER**

BARBARA K. GEIER  
Powell, Goldstein, Frazer & Murphy, Atlanta, GA

LORI WEISS  
Shook, Hardy & Bacon, Kansas City, MO

## PLL BUSINESS NEWS

by John H. Davey

Dechert Price & Rhoads, New York, NY

**T**HE PLL/SIS EXECUTIVE COMMITTEE and the AALL Executive Board are pleased to announce the appointment of Hazel Johnson as an official representative to the American Bar Association Law Practice Management section. This strategic partnership serves to establish contact with the practicing bar, and to explore opportunities for librarians and lawyers to work toward mutually beneficial ends. Stay tuned for more information!

Ballots have been mailed to all PLL members for the 1997-1998 PLL Executive Committee Elections. The slate of candidates is listed elsewhere in this issue of *PLL Perspectives*. Congratulations to Georgine O'Connor, Martha Goldman and Sandy Gold, this year's Nomination Committee, for bringing together an excellent slate of candidates. Be sure to return your ballot to Jean O'Grady by May 14.

The PLL/SIS has created a copyright form to be used for both *PLL Perspectives* and its webpage. Thanks to Aimee Ruzicka for her work on this project.

In response to the PLL Strategic Plan, the PLL Executive Committee has established the Consumer Advocacy Committee.

Kathie Sullivan has been appointed as Chair. This committee will be responsible for carrying out Strategic Initiative #2. Watch for more information.

Also in response to the PLL Strategic Plan, a Task Force has been created to explore the possibility of conducting a research project measuring and evaluating the perceived value of the librarian in the private firm setting. Mark Estes has been appointed Chair of the Task Force. Watch *PLL Perspectives* and *Privatelawlib-1* for more details.

Plans are progressing for the first educational program sponsored by the PLL at the Association of Legal Administrators' Annual Meeting, to be held in Seattle in May 1997. The program, featuring a panel of law librarians, is entitled, "Maximizing Information Resources: Does Your Firm Value Its Library?" In addition to the program, the PLL/SIS will be staffing a booth in the exhibit hall. Barbara Cornwell Holt and Christy Leith Davis are chairing this exhibit committee. A full report of this project will appear in an upcoming issue of *PLL Perspectives*.

The PLL Advertising Committee for *PLL Perspectives* is trying to acquire information regarding potential advertisers. If you are aware of any organizations or vendors that would be willing to place ads, please contact Rachel Jones at (202) 775-4777 (jonesr@dsmo.com) or John Davey at (212) 698-3515 (jdavey@dechert.com).

## RECORDS MANAGEMENT GROUP REPORT

by Jeanne Reynolds  
Kemp, Smith, Duncan & Hammond,  
El Paso, TX

**H**ELLO FROM THE CHAIR OF THE RECORDS MANAGEMENT GROUP. I have been working to get our directory updated and will be sending it out soon. All current members will receive one copy automatically; but if you are not a member and would like one, please call me, and I'll send you a copy.

At the annual AALL meeting this year, we will be having our usual business meeting and a program. The program is tentatively planned as a very informal exchange of information. We plan to send out a simple questionnaire asking for basic information about your records center operation. Depending on the number of replies, we then plan either to compile the information or to copy the responses and share them in Baltimore. I think everyone wonders how others have handled particular problems: What kind of software they're using, how they handle conflicts, etc. I have not

developed the questionnaire yet; so if there are questions or areas of concern you would like to see addressed, please let me know. I plan to distribute the questionnaire at the same time as the directories are mailed which should be mid-April.

It was decided in Indianapolis last summer that we would like to sponsor a one-day workshop in Anaheim in 1998. We will probably try to schedule it for the Saturday before the conference officially begins, and there will be a registration fee which we will try to keep as reasonable as possible. Our program proposal will be due this summer, so I need input, assistance, volunteers, etc. The program content is wide open at this time, so if there is some particular topic, problem area, issue, etc. you would like to have considered or if anyone is interested in volunteering to coordinate the program with me, please contact as soon as possible.

I look forward to hearing from you:

Jeanne Reynolds  
Kemp, Smith, Duncan & Hammond  
2000 Norwest Plaza  
El Paso, TX 77901  
(915) 546-5331 (Phone)  
(915) 546-5360 (Fax)  
jrey@kempsmith.com

### PLL PERSPECTIVES

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