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BUDGET AND ACQUISITION SELECTION TOOLS FOR THE PRIVATE LAW LIBRARY: CAPLL RECOMMENDATIONS FOR PLL VITAL READING

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ONE OF THE GOALS of the Consumer Advisory for Private Law Librarians (CAPLL) is to share "heads up" type of advice and recommendations with colleagues. The members of the Committee have volunteered for this initiative because they have been more or less successful in their libraries in dealing with publishers, monitoring and adjusting budgets, making informed acquisitions, and in some cases, informed cancellations.

CAPLL is a "blue ribbon" committee, if you will, of firm librarians representing geographically diverse law firms of varying sizes and budgets. The committee members manage budgets ranging from \$150,000 to \$1.4 million, budgets large enough to have a substantial library but not large enough to have money to waste. They work for firms with up to 200 attorneys in the local office; and since they are often the only professional librarian in the office, if not the firm, their suggestions are a result of being in the trenches and having hands-on trials and tribulations.

Terry Psarras has written about managing the boxes that arrive in our mail every day and how to minimize the unsolicited items. The other half of the story is learning how to make informed decisions in the first place, ordering just the right book and so not having to follow Terry's advice!

I polled the members of the committee (hereafter, "we") to learn of their favorite selection tools and to learn how they applied the data from the AALL Price Index in their daily work. I was looking for their expertise, the practical and workable suggestions that aided them and allowed them to prepare and monitor budgets and make informed purchases. I wanted the short list of basic and reliable tools that allowed them to be effective consumers and might provide guidance for others to become more effective in their work.

By and large, when asked to purchase books to support a particular practice area, we consult our colleagues who may already be working in the area, we either know someone personally or

we ask a question on a list such as lawlib. We still occasionally consult the brochures and catalogs that arrive in our mail and are as likely to have a brochure brought in by an attorney as we are to initiate the inquiry. (Often, however, the full catalog from a publisher is more helpful than a single brochure because it outlines the complete product line in a subject area.) We look at *Legal Information Buyer's Guide and Reference Manual, 1997-98* (Svengalis), as much for selection as deselection since we use this to prepare budgets as well. Other titles which prove to be of some use are *Specialized Legal Research* (Chanin) although it is limited in areas of practice; *Law Books in Print*; the Infources Publishing arsenal of *Legal Looseleaves in Print*, *Legal Newsletters in Print*, and *Directory of Law-Related CD-ROMs*; newsletters such as *Legal Information Alert*; *The Legal Publisher* (JK Publishing, \$149 per year, 414-332-1625). A new resource mentioned on lawlib recently is the newsletter *Against the Grain* (Against the Grain LLC, Charleston, SC, \$35 per year) which contains general information about budgets and media format and publishing trends, some of which might be useful to a special library. Mostly, our budgets are too tight to allow for proactive purchases, and we spend a lot of time canceling materials or looking for suitable substitutions for books with spiraling costs. Some purchases are made when new practice areas are added; but in situations like these, the attorneys already know the standard works for their area and simply make requests for specific titles. In some cases we consult our field sales representatives, but they are not a first line resource. Sometimes a resource such as *Legal Research and Law Library Management* (Marke and Sloane) will start us in a right direction and then we make inquiries of colleagues and ask for evaluative responses from the field.

Not to be overlooked are sources of book reviews to get an idea about the strengths of competing products. Often these reviews are written by practitioners or by *continued on page 4*

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FROM THE CHAIR

by Anne V. Ellis
Holland & Hart, Denver, CO

SOMETIMES I GET MY BEST IDEAS in the middle of the night. The only problem is that even though my creativity is in full force, I don't want to get up, turn on the computer and start typing. Usually, I remember only pieces of my inspiration. But, today, at the beginning of an exciting new year, I was struck by three things that stirred my imagination: first, an article written by Bill Beedemeyer, second, the AALL SIS column edited by Melinda Davis and third, the publication of the salary survey letter sent by Judy Meadows and me to Altman Weil Pensa. All three were published in the December 1997 issue of *AALL Spectrum* and brought to mind that private law librarians are a rare breed.

Let me relate a couple of thoughts from Bill and Melinda. Bill's article was extremely humorous and truly brought home to me the differences between the "big three" special interest groups - academic, private and state, court and county. None of the Sections is any better than the other. We just have different interests, work patterns and clienteles. I am pleased to be a part of the private law library community. But there have been moments when I have wistfully thought of deserting to assume, what I considered at the time to be a more peaceful, tranquil setting in academia. Bill, with his article, has persuaded me that there is craziness even there. That article also reminded me of an experiment my academic colleagues and I conducted.

A few years ago when I was still in Florida, I invited my Stetson Law School colleagues to do a library swap so that we could each see what the other really did. For a week, two academic law librarians became part of Carlton, Fields' library staff. They were amused, educated and stressed! This was when I began to think that maybe they were right and I should seek the simpler life. In exchange, my reference librarian went to Stetson for a week of what I perceived to be calm. She returned with tales of getting back to the theoretical roots of law librarianship and being in touch with educating new legal minds. I realized, however, that the real differences in our environments are between working in the challenging world of theory and pure education versus working in the real world of pragmatic librarianship for practicing lawyers. Neither one is holier, calmer or less challenging than the other, just different.

Melinda Davis characterized the PLL/SIS as the "Energizer SIS." She could not have been more correct. PLL has always had strong, enthusiastic members with lots of ideas and little time to accomplish them. PLL leaders have always worked hard to pull both idea and action into some cohesive structure. This was accomplished with the writing of the PLL Strategic Plan in 1996. We have a good focus on what we want to accomplish and are going after it. Our activity may seem a little frantic to our other colleagues; but we are really less scattered in our endeavors because of our focus. The PLL Strategic Plan took a lot of work but continues to guide us in 1998 and beyond. It gave us our vision and

made us look at our beliefs as private law librarians.

Private law librarians are being asked to assume more responsibilities and new roles every day. Having just been through my second experience as manager of a conflicts and records conversion in addition to managing the library, I can only say that I thought that once was enough! But, software and hardware changes, and law firms must follow. Private law librarians also face the challenges presented by lawyers who need practical research, training, and information creativity; and they need it fast. We are inherently "energizer librarians." We give excellent customer service in a timely manner and accept accolades when given. Sometimes, however, we only pat ourselves on the back and jump into the next experience. We are also the keepers of knowledge. That knowledge, however, costs a lot. Because we work in the for-profit community, we must be budgeting gurus to provide the best information at the least cost. So, with all these stresses, why do we keep going and going and going?

When I wrote to Altman Weil Pensa, I took a hard look at what compensation we receive for such labors. I was pleased to see that salaries had definitely risen since I became a law librarian in 1984. But, I was also surprised that the top salaries were not higher and that the average salaries for law firm librarians were lower than I expected. Here we are, some of the most dedicated, resourceful and intelligent people working in the legal world. What do we need to do to impress upon the Altman Weil Pensa consulting-types and our own administrators that we should be valued more highly? My answer comes back to the fact that we must market ourselves as the experts who keep the basic tools of the legal profession available, understandable and affordable. We cannot whine about not making enough money or not being appreciated if the powers that be do not see our worth. So get out there and bang your drum and toot your own horn!

In many ways, there are no real differences among all of us. I thought about this as I sent my son off to the University of Florida College of Law. My parting advice to him was to "get to know the librarians immediately. They will be your best advocates in law school." Since he has watched and listened to both triumph and disaster stories about law firms for years, it makes me feel good that he still wants a legal education. He will see the intelligence and dedication that academic law librarians have. I am glad that he will have seen and learned from the best of both worlds.

From my perspective, private law librarians seem to like the pace of work that law firms and corporations offer. We accept and conquer the challenges of managing knowledge in a for-profit world. We also do our best to enhance how our fellow private law librarians work through our activities in PLL. If we look a little crazed to our academic and court colleagues, we remind them that we are the "ENERGIZER SIS." Now, where did I put my pink suit and bunny ears?

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acquisitions librarians. "Best Reference Books of 19xx" is published in *Law Library Journal*; New York Law Journal and probably many other state or local legal newspapers publish reviews; *Legal Information Alert*, *The Legal Publisher* and *Law Practice Management* (from the ABA section of the same name) also offer book critiques. Sources of reviews on the World Wide Web which should not be overlooked are the sites maintained by Law Journal Extra, various databases on LEXIS and WESTLAW, publishers' sites, and listserv archives.

Because our budgets are tight, one would think we would welcome a study of legal publishing costs as provided by the AALL Price Index (PI). In fact, CAPLL members were rather luke-warm about the PI, and their feelings are probably representative of the feelings of other private firm librarians. Why? Partly, because in the past, the publication date was out of sync with firms' budget years. Sometimes we are hampered by the bookkeeping systems in place and the inability to transfer the PI categories to a general ledger account. We also find the categories of titles do not match our smaller collections: Some of us collect only a third of the titles used in the PI and find it very difficult to match purchases to the figures provided. Most CAPLL members use the PI to arrive at "ball park" figures, to estimate trends in increases and to see the big picture. But as for applying the specific information to our budget, we don't. We are still working in the microcosm and tend to estimate a percent increase, look at our previous cancellations, look at our own records of costs or respond to a managing partner's direction to "cut \$10,000." We spend a lot of time with attorneys, talking about their research needs, finding out what they can live without, offering suggestions for a less costly title. We are split on whether we even purchase the PI or rely on librarian discussions about it instead.

I asked Margie Axtmann, Assistant Director for Collections and Technical Services at the University of Minnesota Law Library and editor of the AALL Price Index, to offer some thoughts on how private firm librarians could better use the index, especially in light of the fact that the titles evaluated have little bearing on what private firms are collecting.

Axtmann says, "A price index is a method of showing the relative change in the average price of library materials over an interval of time. To do this the list of titles used to compile the index must be representative of the range of materials produced by the legal publishing industry, but the list also must remain relatively stable over time. If I were starting over on the Price Index (a thought that has crossed my mind), I would use a different list of titles. But the effect would be the same, because the list would still be a sampling of various types of materials from all the major legal publishers.

"The Price Index is not a study of supplementation costs, nor is it a forecasting tool; it is a retrospective look at average prices for a group of publications. Inflation in

the prices of library materials can be compared to other standard measurements, in particular the Consumer Price Index. In recent years this was a very useful comparison, as library materials' inflation could be seen increasing at a rate of about 10% per year at a time when inflation for ordinary goods and services was below 5% per year. That's a good figure to have if other institutional budget increases are being based on the CPI.

"I know law librarians in all types of libraries who use the Price Index as part of their annual planning and budgeting process, usually as an 'outside source' to attach to the budget request. I even know of law libraries where budget increases are tied to the percentage increase noted in the previous Price Index. Still, every law librarian must use the Price Index in the way that works with the methods and culture of the institution. A price index is a useful benchmark against which local costs can be compared, but it is not a substitute for cost data about individual collections. I use the Price Index in conjunction with several other sources. These include other price indexes, The CRIV Sheet, articles from library literature, articles from legal practice-oriented magazines, and newer sources such as the *Legal Information Buyer's Guide & Reference Manual*. No matter how many other sources I use when writing budget requests or memos on pricing, I always use them with reference to our own collection.

"AALL is trying to get the Price Index out earlier in the year to make it more timely for libraries on a calendar year budget cycle, but there are inherent problems with turning a fiscal year publication into a calendar year one. The upheaval in the publishing industry has made it difficult not only to track prices but also to identify the publishers of specific titles. As the editor of the Price Index, I take full responsibility for the content and the publication date, but I am more than happy to receive suggestions for improvements to the publication from librarians in all types of libraries. We want to be responsive to the price information needs of all librarians managing legal collections."

When I first earned my degree and started working in a firm I had no idea where to start when asked to make a new purchase. I may have known about such tools as *Law Books in Print* but in a panic that knowledge disappeared. As it turns out, and as evidenced from conversations with more experienced librarians, such a voluminous publication may not be the best tool for adding law books to a law firm collection. We are all in a position to be proactive in our acquisitions, not by making arbitrary choices, but by making informed purchases of the best product for the best price. Using all or some of the tools available to us, including using the AALL Price Index in whatever manner works for our office, will make all of us better consumers in the long run.

Hot Off the Press: AALL RESOURCE GUIDE



First in series helps law firms assess information needs

How to Hire a Law Librarian, the first of eight AALL Resource Guides designed for law firm library managers, is now available from AALL Headquarters. It kicks off a series of publications supported by LEXIS-NEXIS, designed to educate decision-makers on critical information issues affecting law libraries.

Keeping Management Informed

"One of a private law librarian's biggest challenges is keeping management apprised of changes in legal information and how they impact the law firm," says Resource Guide editor Michael Saint-Onge, librarian at Coudert Brothers in San Francisco and former chair of AALL's Private Law Libraries Special Interest Section.

"As experts on the changing environment," we must help management understand the whole picture so they'll fully appreciate the services and value a law librarian brings to the firm."

"How-To" Guide

How to Hire a Law Librarian helps firm managers understand how information is used — and could be used — in their organizations. It includes:

- Detailed needs assessment
- Real-world examples
- Law librarian responsibilities, qualifications, and skills
- Guidelines for job descriptions, compensation, and benefits
- Recruiting and advertising ideas
- Interview questions and evaluation tips
- Guidelines for maximizing investment in information expertise.

Special Subscription Rates Now Available For AALL Resource Guides

By subscribing to the series of eight AALL Resource Guides, you save one-third over the individual copy price.

AALL member subscription: \$60
Non-member subscription: \$80

How much is it worth to help your firm seize the power of information?

Order your AALL Resource Guide subscription now and prepare your library decision-makers for the future.

Coming Soon: Guide #2

Expanding Roles for Law Librarians, the second in the series, is scheduled for completion in early 1998. It highlights the many areas where law librarians can contribute to the firm — including non-legal research, records management, conflicts-checking, CLE, knowledge management, marketing, and Management Information Systems (MIS).

"Our research shows that a number of law librarians have information-related responsibilities outside the library," says Roger Parent, AALL Executive Director. "The second Resource Guide is designed to help law firm leaders expand their thinking about what a law librarian can do for the organization."

Information From Experts

Each Resource Guide is a product of collaboration by leading law librarians, subject-matter experts who provide ideas, research, and information. Design and development costs for the series are being offset by a generous contribution from LEXIS-NEXIS.

Quick Overview

Written from a management perspective, the Resource Guides are especially appropriate for law firm administrators and managers who want a quick overview of the key points of an issue and how it may impact the law firm.

The Resource Guides range from 8 to 12 pages in length, and are available as a subscription series or by individual copy.

All eight Resource Guides are expected to be completed by June 1999. Topics planned include:

- Law Firm Library Space Planning
- The Internet as a Legal Research Tool
- Rebalancing the Law Library—Evaluating Online, CD, and Print Resources
- Electronic Research: Who Should Do What?

Resource Guide Price List

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	<u>AALL</u> <u>Members</u>	<u>Non-</u> <u>members</u>
SERIES	\$60 for	\$80 for
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MULTIPLE COPIES (2 or more total copies, of same or multiple Resource Guides)	\$9.50 each	\$12.50 each
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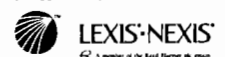
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MARKETING LAW LIBRARIANSHIP: SURVEY RESULTS IDENTIFY TRENDS IN MARKETING TECHNIQUES

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A SURVEY inquiring about the use of formal marketing tools was published on the lawlib list in 1997. Although responses were from all disciplines of law librarianship, this article examines current marketing practices of private law librarians. It looks first at the use of formal marketing strategies, and second, examines perceptions of law librarians. The conclusion focuses on the direction of law librarian marketing trends.

Marketing strategies have been frequent topics of discussion in library literature and continuing education programs. Kathy Shimpoek-Vieweg pointed out in her 1992 *Law Library Journal* article, "How to Develop a Marketing Plan for a Law Firm Library," that "often the firm library is viewed merely as costly overhead," and "marketing should be seen as a fundamental element of library operations." Private law librarians must market to administration, attorneys and staff to maintain a significant role within the organization. Herbert White, a regular contributor to *Library Journal*, pointed out in a February 1997 article entitled "Marketing as a Tool for Destabilization," that "the role that the librarian or the library has in the organization can directly affect the library budget."

FORMAL MARKETING TOOLS

Every organization has an organizational objective. Many run under an unwritten statement of goals and objectives. When asked in the survey if marketing was a part of the library organizational objective, eighty-nine percent of librarians responded in the affirmative; however, only twelve percent of those responding to this question have a formal policy statement defining the marketing objective. A marketing plan is a comparable marketing management tool, and such a plan has been adopted by eighteen percent of the respondents.

There are many advantages to creating a written marketing objective statement or plan. Highly motivated libraries would include both in the library structure. A written marketing plan allows the entire library staff to understand both the significance of marketing library services and the process by which library administration plans to implement marketing strategies. However, Shimpoek-Vieweg points out that marketing the library will be successful only if all members of the library staff recognize its importance and adhere to the policies adopted. A formal plan should state a marketing objective, give guidelines for achieving that objective and budget for the tasks needed for implementation. The staff should participate in the development of the

marketing plan to bring unity in the common goal of adopting a workable plan to enhance the role of the library. The article presents guidelines for adopting a marketing plan which are still useful today.

A written marketing plan can also be used as a tool for evaluating library staff performance. Staff members individually or library services on the whole can be monitored and used to weigh success at year end. This procedure provides library administration with a written evaluation tool to give to staff members or to firm administration to allow them to recognize library achievements, such as new programs or cost savings. In addition, the prudent law librarian will also prepare an annual plan for the upcoming year during the budgeting process. Herbert White points out that librarians have traditionally marketed what they are currently doing rather than what they could do.

None of the law librarians participating in the survey budgeted for marketing. Comments indicate that marketing expenses generally come out of a miscellaneous account for food, travel and staff functions. One response which mentioned the library newsletter budget as a marketing line item made a good point. Newsletters and other publications are useful tools in promoting library services. Although no libraries seem to itemize marketing on the budget, it is evident that parallel accounts are used for marketing tools.

If we recognize the many advantages of implementing marketing strategies, why are formal marketing plans adopted by so few law libraries? Time is often a key obstacle to developing and maintaining a marketing plan. The general trend is for each librarian on the law library staff to participate in the informal marketing process. Two questions on the survey targeted staffing for marketing management responsibilities. None of the survey participants dedicates a library position to marketing. This is not surprising. Staffing is traditionally at a minimal level in the private law library.

When asked if there is a staff member who is assigned the task of managing library marketing, all responses reflect informal marketing practices. Informal marketing encompasses individual user surveys, changing individual practices according to user needs and desires and informally passing along information to other library staff members. I propose that one person be assigned the task of monitoring the marketing practices as part of regular responsibilities thus allowing one person to focus on the marketing process. All staff members play key roles in developing and implementing the marketing plan; but I suggest that one staff member maintain the plan, remind staff members of the time table established, create formal ways to determine user needs and desires, and work with the entire staff to develop revised library services to meet those needs. The plan has a better chance of success if the marketing process is managed rather than informally assigned to all staff members.

Many private law librarians work in a single librarian shop. The time needed to implement formal marketing practices is generally not available to them, however, solo librarians can be creative in developing marketing strategies. They can rely on

other law librarians that work in large firms or companies large enough to implement formal marketing procedures. Often these librarians are willing to share their practices. Articles and manuals are also available to provide guidelines for developing formal marketing plans. Of course, branch librarians should be given assistance by the main office library staff in implementing marketing strategies. The librarian is called upon to be innovative in finding the time and resources to successfully market the library.

PERCEPTIONS

A series of survey questions was designed to determine law librarian self-perception and the perceptions of the parent organization. The outcome was positive: 94% of the respondents indicated that they perceive themselves as professionals and as an integral part of the organization; 92% of the survey participants felt that administration and attorneys perceived them as professionals. This portion of the survey should have been expanded. Comments on these questions indicate that there is a difference between the perception that the law librarian is a professional and the perception that the library and its staff are an integral part of the organization. Further examination of librarian participation in committees other than the library committee and/or administrative meetings and involvement in the planning for the organization would help determine more accurately the perceptions that administration and attorneys have of law librarians and library services.

Looking at the roles that law librarians are given in the administration of the organization as a whole will indicate the value that law librarians are given. In Herbert White's 1997 article, he discusses the role that marketing plays in public libraries. His suggestions apply to librarians in all areas of the profession. One interesting point he makes is that much of library marketing must target public perception. New technology, budget cuts on print sources and the lack of understanding of what librarians actually do result in the general perception that the librarian is extinct. Similar opinions can be found among attorneys and law office administrators. Education about the roles that law librarians can take within the organization is a very important part of a marketing strategy. We have all heard the questions: "What do librarians do?"; "Will there be any books in the library in five years?"; "Aren't cd-roms taking the place of librarians?" Librarians are changing roles to address technology and other changes affecting libraries. A concerted effort needs to be made to educate the legal profession about these changes and to move away from the perceptions that may hinder the value given librarians and library services.

NON-TRADITIONAL MARKETING TOOLS

Successful marketing is achieved by reaching large numbers within a target group. A majority of the marketing tools used by law librarians are aimed at users within the organization. Of course, immediate library users are the most important target group, but law librarians should consider expanding marketing

techniques and gaining exposure by utilizing marketing techniques that go beyond the parent organization.

Three survey questions focus on the use of marketing opportunities outside the library profession. When law librarians were asked if they write for journals other than those sponsored by the library profession, seventy-eight percent of the academic law librarians responded affirmatively, but only twenty-seven percent of the private law librarians replied that they have written for such journals. In addition, only twenty-eight percent of the survey participants are members of organizations or attend meetings outside of the library profession.

In the Winter 1996 issue of *PLL Perspectives*, Laura Olsen Dugan argued in an article entitled "Marketing the Private Law Library: Tips, Tricks and Techniques," that librarians should seek marketing opportunities outside of the traditional library setting. Dugan's suggestions include speaking at CLE programs, local bar association meetings, and Association of Legal Administrators meetings. There has been increased activity among law librarians in these areas, and it is hoped that the number of law librarians making use of these non-traditional marketing techniques will continue to grow.

CONCLUSION

Law librarians are challenged to change perceptions within the legal profession in order to grow as professionals and as an integral part of the practice of law. Survey results indicate that law librarians are very active within their organizations in marketing themselves and library services. Results also show that a small percentage of our profession implement formal marketing strategies that include opportunities beyond the library setting. Moving outside the library increases exposure and allows librarians to be seen in other professional environments. Often when roles are defined within an organization, as "librarian" or "attorney," communicating outside of the traditional setting can break down barriers and allow a dialogue with a new perspective and attitude. This may allow information to be conveyed differently and successfully.

Firm administrators may be hesitant to support librarian participation in activities outside of the organization. Law librarians are faced with the challenge of conveying the importance of continuing education and of what law librarians can offer. A very realistic argument for gaining administration's support is that librarian participation in functions outside the firm will also give the firm recognition.

The difficult task for law librarians is to create a balance between providing optimal services and taking the time to develop and implement formal marketing strategies. The time spent creating a workable marketing plan and taking advantage of marketing opportunities outside the traditional library setting is worthwhile in promoting law librarians individually and the profession generally.

I would like to extend my appreciation to all of the librarians who took the time to respond to the survey. The responses were enlightening and assisted me in determining the trends and issues involved in marketing law librarians and library services.

TEN DOTS ABOUT LIBRARY BUDGETS

By Wanda E. Gozdz,
Library Consultant

LIBRARY ADMINISTRATION has substantially increased over the past several years due to the constant merger of publishing companies. Librarians responsible for overseeing library budgets may find the following tips helpful.

- Create a line-item budget by vendor of current material in the collection. Titles and costs can be found in the accounts payable files, or an account audit can be requested from the vendor with annual cost projections. Prices are increased 5-25% annually.
- Circulate the budget to all library patrons in order to create a survey of usage. Have all users initial items they frequently use in the library. A compilation of this report will give an accurate guideline in order to determine retention or cancellation of titles.

- A core collection consists of State or Federal practice material such as cases, statutes, digests and specialty areas. Primary and/or secondary sources are needed in heavy practice areas such as tax, bankruptcy and securities. CD-ROM products are applicable for branch offices.
- Create a new acquisition fund for the year (\$1,000 - \$3,000). Monitor these expenditures by using a Library Request Form. A partner or committee chairperson should approve expenditures over \$250. New acquisitions should appear as line items in the following year's budget.
- Place all subscriptions on a calendar year renewal schedule because most vendors raise prices at this time. Sign two-year renewals for price protection. Stagger vendor start dates to manage cash flow on large accounts. Request one account number per vendor and have invoices sent to individuals responsible for processing payments. The "Ship To" address should be "Attention: Library." Pay invoices in full in order to reduce paperwork and save on vendor administrative charges. Vendors may provide discount incentives for timely renewals.
- Purchase products on a cash basis in order to receive a 5-10% discount as well as savings on shipping and handling charges. Use sales representatives to place orders instead of telemarketing or direct mail requests. Salespersons will provide better service when help is solicited.
- Pay from original invoice at all times. Documents should be stamped with date product is received, initials of receiver, amount to be paid and person approving invoice. Duplicate invoice requests should clearly state "Duplicate Copy" and should be received and verified in the same format as an original invoice.
- Statements verify receipt of invoices and carry any credits from prior payments. Credits should be applied on invoices to be paid and supported with reference credit number. Credits appear only on statements.
- Invoices processed for payment should be submitted with Payment Receipt Coupon and invoice number and/or account number should appear on the check for proper credit application.
- Vendors automatically renew subscription services unless they receive a written Request For Cancellation. Invoices will be sent annually. For large accounts, titles can be staggered by practice areas so they renew on different months.

AALL/PLL GRANT APPLICATIONS (AALL CONVENTION)

PURPOSE:

The Purpose of the PLL Grant is to financially assist individuals by reimbursing grant recipients the cost of transportation to attend the annual convention of the American Association of Law Libraries. Individuals chosen to receive a grant hold promise of future involvement with AALL and especially with Private Law Libraries/Special Interest Section.

QUALIFICATIONS:

An applicant must be a member of PLL at the time of application. In the event circumstances prevent the use of the grant by a grant recipient, the grant reverts to the PLL Grants Committee for disposition at the discretion of the Grants Committee members. Prior PLL Grant recipients are not eligible for an award.

DEADLINE:

Completed applications must be postmarked, faxed or e-mailed by the second Friday in April (April 10, 1998). Late applications may be considered at the discretion of the Committee.

Application forms should be obtained from and returned upon completion to:

Druet Cameron Klugh
Senior Librarian
Holme Roberts & Owen
1700 Lincoln, Suite 4100
Denver, CO 80203-4541
Phone:303-866-0444
Fax: 303-866-0200
E-mail: klughd@hro.com

Applications must be typed or LEGIBLY written and include the following information:

PERSONAL INFORMATION

1. Name
2. Mailing Address
3. Telephone (Daytime) (Evening)
4. Facsimile
5. E-Mail
6. Have you applied for a PLL Grant before?

EMPLOYMENT

Beginning with the most recent and no more than five years earlier, list relevant employment giving as complete a record as possible. Include all positions relating to library or legal work, either of a professional, paraprofessional or clerical nature. Include the name of institution or employer, employment dates, title of position, and nature of duties.

PROFESSIONAL ACTIVITIES

List professional organizations in which you have been active, time periods, and involvement.

EXPENSES

- A. What is the TOTAL approximate cost for you to attend the convention? Include approximate amounts for transportation, registration, lodging, meals, other.
- B. Will your employer pay any expenses? If yes, what amount or percentage of convention expenses will your employer pay?
- C. Have you applied for any other sources of funding, including any AALL grants?

PERSONAL STATEMENT

On a separate sheet, explain why you feel you should be awarded a transportation grant. Please include any extenuating circumstances. The Committee will consider your statement heavily in making its decision. Do not exceed one page.

RECOMMENDATIONS

Two (2) letters of recommendation are required and must be sent with your application. Recommendations should be sought from peers, employers or instructors familiar with you and your library/information related activities.

PLL NEWS

AALL, PLL AND LPM—AN UPDATE

by Hazel L. Johnson

AALL Official Representative to the ABA Section
on Law Practice Management

THE INTERACTION between AALL, PLL and the ABA's Law Practice Management Section (LPM) has continued to evolve over the past few months. As I reported in Baltimore, Joel Bennett, Section Chair, and Gary Munneke, Chair-Elect, attended various events during the AALL annual meeting and were very impressed with the quality of the meeting, its programming and law librarians in general.

Later in the summer, I was appointed to the Section's new Media and Internet Board, which oversees the Section website (www.abanet.org/lpm/home.html) and deals with any Section issues involving media other than print. I will be working specifically with the policy group and will help develop policies and procedures for the Section to begin producing publications in alternative formats (ed-rom, internet, etc.). This should be a great opportunity to continue to showcase the talents of law librarians.

During the Section's November meeting, I presented a proposal to the Practice Management Advisors Task Force. The proposal suggests ways that law librarians can assist with the work of a state's law management advisor program (LMAP). Eleven states have established LMAPs to provide consulting services to lawyers desiring assistance in managing their offices and practices. The LMAPs also consult with lawyers required to seek assistance due to disciplinary actions. The task force is very interested in the proposal and will discuss it at length during the spring. Stay tuned for further developments.

A comprehensive packet of materials detailing AALL and PLL activities over the past few years was presented to Gary Munneke (Section Chair-Elect and Chair of the Partnering with Profit and Non-Profit Entities Task Force) during the meeting. The packet included a variety of suggestions for future partnering opportunities for AALL, PLL and LPM. Discussion on those ideas continues.

LPM is the sponsor of TechShow, one of the major technology shows for the legal profession, which is held in Chicago each March. AALL will be acting as a co-sponsor of TechShow 98. There are a number of law librarians featured on the program thanks to the good work of Gayle O'Connor, a law librarian and member of LPM's TechShow Board. I am pleased to announce that the Chicago Association of Law Libraries will assist in the TechShow internet lab, providing one-on-one instruction for TechShow attendees. If you have the opportunity to attend TechShow in March, be sure to support our colleagues.

Plans are underway to include Section publications for sale in the AALL Store during the Anaheim meeting. We hope to have reciprocal sales of AALL materials during the annual ABA meeting. This could prove to be a great market for the Toolkit, the Salary Survey and the new law firm library resource guides.

I'm also pleased to announce that a program proposal that I submitted under the LPM umbrella for the 1998 ABA Annual Meeting in Toronto has been accepted. Tom Fleming, Library Director of Piper & Marbury, Baltimore, will present a program on the "Economics of Information" on Monday August 3, 1998. Tom will adapt his program from a similar one that he developed for SLA and AALL. Since the focus of LPM is the solo and small firm practitioner, Tom will be discussing ways in which the smaller firm can value its use of information. I'm sure one of his primary tips will be to acquire the services of a law librarian. Be sure to encourage the attorneys in your firm who attend the ABA meeting to stop in for Tom's program.

Please visit the LPM website or review Law Practice Management magazine and let me know if you have ideas on how we can further our collaboration with the Section. I can be reached by E-mail at hjohnson@visi.net or by phone at 804-282-0807.

PLL PROGRAMS FOR ANAHEIM

By Nancy Adams

Sheppard Mullin Richter & Hampton LLP
San Francisco, CA

AS A RESULT OF THE DEDICATION, hard work and great ideas of the PLL Education Committee, one workshop and nine programs proposed by PLL members will be presented at the 1998 Annual Meeting in Anaheim in July. (This announcement would have been brought to you earlier but for technical communication problems—e-mail that didn't work at a critical moment.)

The Education Committee would like to thank everyone who suggested program ideas and speakers. We encourage everyone to include these programs in their plans for Anaheim:

- The Challenge of Records Management: New Horizons for Private Law Librarians (Workshop W-2)
- Evaluating Search Engines for Legal Research (Technology, advanced)
- Providing Quality Customer Service: the Tattered Cover Standard of Outstanding, Exceptional Service (Management, intermediate)
- Managing Electronic Communications (Management, intermediate)
- Securities Filings: Who, What, When, Where (Law, intermediate)
- That's Not Legal: Business Information Sources (Information, advanced)
- Information Audit: A Tool for Rebalancing Your Information Resources (Management, intermediate)
- Knowledge Management: Change on the Horizon for Law Librarians (Management, intermediate)
- Time Management for the One-Person Library: Is There a Light on the Horizon? (Management, intermediate)
- See New Horizons From Above the Glass Ceiling: A CEO's Experience in a Predominately Male Publishing Industry (Management, intermediate)

Nancy Adams and Tom Duggan
PLL Education Committee Co-Chairs

RECORDS MANAGEMENT GROUP

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

I CAN'T BELIEVE we're already into the second quarter of 1998. AALL in Anaheim is just around the corner. By now you should have received the conference materials for the July meeting, and I hope you will take time to review all the offerings; but particularly the day-long workshop our Group is sponsoring. Both Lee Nemchek and Beth Chiaiese are Librarians and Certified Records Managers, so you will get double the expertise for your money. The description in the conference materials is necessarily limited, as the brochure has so much to cover, but I have a more detailed outline of the entire program. If you are interested in seeing the outline, just give me a call, fax, or email; and I will be happy to provide you with a copy. Who knows, it might make it easier to persuade your management that you should attend when they see just how much information will be presented.

You may have been reading about the Resource Guides which are being written by PLL members, and published by Lexis-Nexis. These guides are designed for "law library decision-makers"

which includes all of us and our management as well. The first guide, "How to Hire a Law Librarian," should already be available. The second guide is entitled "Expanding Roles for Law Librarians" and of course, one of those roles is records management. Our workshop is designed to provide knowledge and information that will benefit you whether you are already involved in records management or just think it may be on your horizon. I hope that if you have any questions about the workshop, you won't hesitate to contact me.

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