

PLL PERSPECTIVES

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

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AS TIME GOES BY

by Joan L. Axelroth, Axelroth & Associates
Silver Spring, MD

The idea for this series of articles originated during the annual AALL conference in Seattle. The editor of *PLL Perspectives*, Jan Brown, had issued a plea for ideas and authors. I had just been involved in conversations with several librarians who spent a significant portion of their careers working for the same employer and so had presided over substantial changes in the delivery of library and information services within their organizations. I suggested asking people who had spent at least a decade in the same job to contribute articles about how their jobs or their libraries had changed. I liked this idea for two reasons. First, I enjoyed listening to these reminiscences and thought others would, too. Second, having worked for a number of employers before starting a consulting business, I did not meet the minimum requirements and so could get credit for helping out without actually doing anything. Jan was too smart for that and so, when asked to get involved, I took the only course left open and said yes.

Jan's PLL listserv request for authors entitled "Do you remember the Old Days?" struck a lively chord. Although the purpose of her e-mail was to solicit contributors to this issue, within two days 58 people were inspired to take fingers to keyboard (why doesn't that have the same ring as "pen to paper?") to share their recollections and ideas with the list. There is every reason to believe the postings would have gone on but for Jan's request to please stop.

Far and away the largest percentage of comments remarked on the old hardware used to gain access to Lexis and Westlaw. Twenty-seven e-mails, almost half, contain one or more references to the old stand-alone Deluxe terminal, with its silver rolls of non-perforated paper and the acoustic coupler used to connect at 300 baud, the Ubiq and the Super-Ubiq supplied by Lexis or the WALT terminals provided by West. Some also recall dramatic changes in content (headnotes only on Westlaw), software (dot commands on Lexis), and pricing (\$22 for a transactional search of the entire federal or state courts databases in Lexis). A few can even remember the pre-Lexis incarnation called OBAR.

The general state of office automation, including handwritten messages instead of voice mail, fax machines with thermal paper, also received a number of mentions as did changes in the technical services sphere. Remember manual library systems limited to card catalogs and Kardexes? Remember cataloging without benefit of KF or OCLC? Or the early days of OCLC, when the company "furnished its own terminals and its instructions warned terminal operators not

to wear nylon underwear"? Please note that all thanks for that memory should go directly to Charles Gibson of Locke Liddell & Sapp LLP in Houston.

Another hot topic: comings and mostly goings in the legal publishing world, including products (the birth of the Current Law Index, the demise of West's ultrafiche) as well as companies. Of course, more companies meant more competition for our information budget dollars. Dale L. Magariel, Stinson Morrison Hecker LLP, Kansas City, recalls when "the publishers . . . had huge competing/extravagant parties at the AALL annual meeting" and asks, "Do you remember having YOUR picture taken with Richard Dysert from L.A. Law?"

Related to that subject is the demise of large print collections. "Remember actually buying full sets of regional reporters from used book dealers, and having a market for reporters you no longer needed?" asks Cindy Adams of McKenna, Long & Aldridge in Atlanta. Kathie Sweeney, Semmes, Bowen & Semmes, Baltimore, notes the days when "[m]ost firms actually had impressive libraries and were proud to show them off," and Marie Canada, Baker Botts LLP, Dallas, recalls "when trial attorneys would reserve a table in the library for 6 weeks or so to prepare a brief."

Nora Levine, Reed Smith Crosby Heafey, Oakland, CA, documented eight steps required to obtain a slip opinion cited in CCH from the courts, circa 1979, involving the use of the telephone to gather information from the court clerk, a formal letter of request typed on firm letterhead, snail mail, and an SASE. (That's self-addressed stamped envelope for those of you who have always received communications via e-mail or, at the very least, fax.) When the opinion finally arrived, you would hand deliver it to the requesting attorney. As Jennifer S. Stephens, Haynes and Boone, LLP, Dallas, put it: "after pulling six cases by the 5th circuit docket number from an online service, I'm so happy to live now."

I was surprised that the Internet was mentioned so few times by name. Betsy Labeledz, Kirkpatrick & Lockhart, Boston, remembers the days when we had to make "a zillion phone calls to government agencies to find government documents that are now so easily accessible on the Internet." An equally true but contrasting sentiment is expressed by Lucy Curci-Gonzalez, Morgan Finnegan, New York, who notes associates' all-too-common belief that everything, including articles from the 1940s, is available on the Net. Mary Grace Hune, Verizon Legal Department, Arlington, VA, recalls using the Internet in

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FROM THE CHAIR

by Holly M. Riccio, Davis Wright Tremaine LLP
San Francisco, CA

What is the state of the image of librarians and libraries today?

I have been thinking about this question quite a bit lately, partly due to my involvement as a member of the AALL Public Relations Committee and partly due to my own personal interest. Just take a look at some library-related events that have taken place in recent months:

- The Librarian Action Figure, from Archie McPhee, is launched, causing lots of controversy and discussion among law-lib readers.
- The Library Hotel, a boutique hotel in New York City, which numbers its guest rooms and stocks them with books according to the Dewey Decimal Classification System, is being sued by OCLC for copyright infringement.
- Singer/Songwriter Tori Amos released her newest album; a compilation entitled “Tales of a Librarian,” and even went as far as to categorize the included songs by Dewey Decimal Number.

It seems to me that libraries and librarians are all over the place – in the news and in popular culture – and our image seems to me to be pretty darn favorable.

Of course, historically, librarians have never been seen as bad or evil individuals. In fact, our image problem has been quite the contrary. We have been described as quiet, mousy people who wear glasses and have their hair in buns. As I read the e-mails on law-lib from librarians expressing how they felt about the Librarian Action Figure, I thought to myself, “If the worst thing that people say about us is that we wear sensible shoes and walk around saying ‘Shush,’ we’re not that bad off.” Just think about what some people say about lawyers and how many lawyer jokes there are out there...

I think the image that most people have of librarians nowadays is very positive and flattering. I think that people have stopped judging a book by its cover, so to speak, and started looking at what librarians do and stand for. Our image isn’t where we, as private law librarians, need to be focusing

our efforts and attention anymore. I believe the attorneys and key decision-makers in our law firms see us in a positive light. The thing that they don’t always see is all that we do every day and all the areas of the firm that we are involved in and have an effect on through our daily activities.

I encourage all of you to take any and all opportunities that arise, whether they are handed to you on a plate or whether you have to create them yourself, to communicate the value you bring to the firm to anyone who will listen. Think up an “elevator speech” and run through it in your head every so often, so you’re prepared when the right moment to give it comes along. Sit in on a practice group meeting at your firm – let them know what library materials and services you have specifically for them in their area of law. Follow up with an e-mail listing all the materials and services you mentioned, and include links to your Intranet to get them to these things quickly and easily. Sign up for listservs and start tracking what is going on in the legal world, either in a specific area of law or in the law firm environment generally, and forward relevant articles to individuals in the firm as “FYI.”

You’d be surprised how far these seemingly simple and small activities will take you in terms of your standing and reputation within the firm. Case in point – a few months ago I forwarded an article about another law firm starting up a new practice group to various individuals at the management level within the firm. One of the people who read my “FYI Article” e-mail forwarded it to another attorney; and within a few days time, our firm had a conference call scheduled to work on developing this new practice group.

There is a column every month on the last page of *O: The Oprah Magazine* entitled “What I Know For Sure.” In it, Oprah writes about something she knows for sure, usually as it relates to the theme of that particular issue. I asked myself that same question and one thing I know for sure is that as our profession grows and morphs with the changing times, so will we; and our skills will become more necessary than ever before.

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its early days – remember gopher? Later, she lists teaching the use of the Internet, along with other research tools, as one of the many things she does today.

Some remember the early days of the profession, “[w]hen you started your own local law librarian associations – no dues, no bylaws, no officers – just a bunch of librarians bringing their lunches and sharing their ideas” (Dale L. Magariel). And “when LLJ was all the serious law librarianship scholarship there was, and you knew everyone’s name” (Elizabeth LeDoux, Covington & Burling, Washington, DC). George Kirlin, Van Ness Feldman, Washington, DC, recalls “being one of the first private law firm librarians with an MLS hired in the city of Phoenix, Arizona, in 1978. I had to do some strong lobbying to convince the members of [the firm] of the value of a professional.”

Mary Margaret Serpento of Kitch Drutchas Wagner DeNardis & Valitutti in Detroit remembers “when mice were trapped, windows were washed ... unix guarded the harem” and, my personal favorite, “[s]oftware was a sweater set, pearls optional.” As those of you on the listserv know, not everyone found this topic so amusing. Why spend time looking back when there is little enough time for dealing with today let alone preparing for tomorrow? For some it may be nice to take a break now and again. Not everything has to be serious or directly applicable to the day’s work. And, for those who are feeling discouraged about moving things forward or about the impact we are having in our chosen field, it helps to turn around and see how far we’ve already come. In this issue, four librarians who have spent more than a few years in the same place do exactly that.

Mary Kay Jung, Director of Library Services at Thompson Coburn LLP in St. Louis, provides a list highlighting some of the changes she has “been part of,” as she modestly puts it, over the past 14 years. These include moving the library from a physical collection to an electronic one and dealing with changes in the legal publishing world. Lori Tarpinian has been the Director of Library Services at Boston’s Mintz, Levin, Cohn, Ferris, Glovsky and Popeo, PC for 11 years. She recounts her firm’s move in just over a decade from a largely print to a largely virtual, web-based collection and details related changes in reference service, delivery mechanisms and options, and staffing.

Gitelle Seer, Director of Library Services at Dewey Ballantine LLC in New York City, concentrates on the changes wrought by e-mail, including a few frustrations (“useless and offensive spam”) as well as its considerable benefits, ranging from improved library staff communications to the ability to provide new and better services. She ends with a few words of advice on the effective use of this integral part of our work lives.

Finally, Jan Brown, Librarian for 23 years with Montgomery, McCracken, Walker Rhoads, LLP in Philadelphia, chronicles her journey from a computer-phobe faced with retrieving documents from the Lexis Deluxe terminal, through advances in interlibrary loan and document delivery options, up to the present. At the conclusion of her article, Jan sums it up nicely for all of us: the tools we use are more extensive and the methods have changed, “but some things remain the same. It’s still about organizing and disseminating information and providing the best service” that we can.

Alert 1/2 Page Advertisement

SOME CHANGES IN ST. LOUIS

by Mary Kay Jung, Thompson Coburn LLP
St. Louis, MO

Among the changes I've been part of in my fourteen years at Thompson Coburn LLP:

We have traded in our Kardex files and book catalogs for automated technical services. We use a bar-coded collection to produce usage data to make well reasoned acquisition and cancellation decisions. We route titles electronically.

We've gone from maintaining three paper lists of passwords (transactional Lexis, hourly Lexis and Westlaw) to creating a database of passwords to keep them all straight.

We have gone from two Lexis terminals located in the library, where we were able to watch and offer help when needed, to firmwide desktop access to Lexis, Westlaw, and a wide variety of other electronic resources. We gave up controlling use and instead, assumed the roles of trainer, accountant and master negotiator. We have argued that some books must be kept to those who believe it's all online. We have taken others, literally, by the hand through the process of pulling a case with Find & Print, all the while assuring them the practice of law will not end with the cancellation of paper reporters. We have convinced Finance it is only fair to pay for citation verification online because we took away the books, and we have tried to convince the attorneys that flat rate does not equal free.

We've become global: We've moved the library collection from a central physical book repository to a balanced collection of library books and links from the library page to library books, links from the library page and links on the Intranet home page and Practice Area pages.

We've taught our administration that fewer books and more online services required less space and fewer tables, but a bigger budget and more library staff.

We no longer fax; we email. We have taught the entire Firm how to search the Internet and, more important, how to evaluate the quality of the information they've found. We have created topical and alphabetical lists of Internet links to point our users to reliable sites.

We have lived (and fought) the citation wars, and we cynically wonder whether the subsequent purchase of West by Thomson benefited any consumer. (Jamie Love, where are you now?) We've kept our accounts (and their names) straight when publisher after publisher was purchased by one or two megapublishers. And we've kept our accounts (and their names) straight, as new online vendors seem to appear and then disappear weekly.

The personal computer and the Internet have changed information retrieval and dissemination beyond anything I could have imagined when I started library school in 1979. And the best, I'm sure, is yet to come.

EMAIL: BOON OR BANE?

by Gitelle Seer, Dewey Ballantine LLC
New York, NY

Email has insinuated itself into the very fabric of my life and wreaks constant electronic havoc. How can I embrace a tool that:

- subjects me to a daily barrage of useless and offensive spam (with promises to enlarge body parts that I don't even own)
- has little ability to convey subtleties of meaning (experts agree that approximately 80% of all communication is non-verbal, but any parent of a teenager already knows this)
- presents the very real danger of "errant email" (confidences gone astray)
- raises expectations that all requests can be satisfied faster (email certainly hasn't speeded up my intellectual processes)
- encourages the unfortunate tendency of email authors to blithely forget the rules of grammar and spelling that they learned in the 4th grade (don't get me started!)
- lulls people who should know better into the belief that they have an expectation of privacy

But I do embrace email; without a doubt it is has dramatically and irrevocably changed the way in which I do my job.

It is not so hard to remember when a typed memorandum, distributed by hand, was the way in which we communicated a message to all of our patrons. One might argue that the intellectual effort needed to write a cogent and informative email is no less than what we used to expend when writing an equally cogent memo. One might also point out the lack of seriousness with which some people take email – i.e., abominable grammar and spelling, frivolous and inexplicable abbreviations. Nevertheless, the knowledge that I can send the same message, or multiple minutely customized messages to suit my target audience, to one or one thousand recipients simultaneously, and that I control the delivery mechanism, is very empowering.

There are countless ways in which email improves or adds value to our services.

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We encourage our patrons to send us reference/research and book requests by email. And we respond in kind by sending information and research results, web pages, files and graphics by email. Whether our patrons are down the hall, down the elevator, or a transcontinental flight away, we can offer “virtual” reference.

Communication with the library staff in the NY office is so efficient, and the ability to communicate simultaneously with our rapidly expanding global staff in all of our offices is unequaled by any other form of communication. It is impossible to imagine the same level of synergy and collaboration between our various library staffs without email.

Emailed “Spotlights,” in which we highlight lesser known services, have allowed us to target our audience and deliver information in concise “bites.” In fact, brief emails in which we educate our patrons about a service, tool, process or procedure have completely replaced a library newsletter. When we relied on the typed memo we rarely distributed missing book notices. Now we use email for that purpose. (Please don’t ask if we have any better luck finding our missing books; at least we can say that we tried!)

We have set up West IntraClips to track news stories about many of our clients, and email alerts are automatically sent to those who wish to receive them, with links to newly added stories.

CLE and training sessions offered by the library are publicized by email, and the invitations, reminders and RSVPs are all handled electronically.

Lotus Notes, which is our email system, allows us to set up agents to forward electronic newsletters and other materials received by email automatically. We set up the filters and criteria, add the patrons’ email addresses, and can even automatically append license restrictions and password language before the emails are forwarded.

Our New Client/New Matter workflow is built on a Notes database. Rather than completing paper forms for opening new matters, and requesting conflicts checks, each participant in the process - the billing partner, secretary, the Finance, Conflicts and Records departments - receives all notifications, forms and documents by email. Compare this efficient, streamlined system with the mountains of paper faxed and pouched between departments and offices, and you can see why we can never go back again.

The effective use of email does require that everyone follow some common sense rules. I encourage the staff (and anyone else who will listen to me) to use the “Reply to All with History” feature, when appropriate. On the one hand, some of our email exchanges turn into the Epic of Gilgamesh, with everyone’s emails appended in an endless chain of point counterpoint. On the other hand, there is nothing worse than joining an email discussion “thread” after it has begun, and without benefit of other participants’ emailed contributions. It is like starting a book in the middle with no idea of how you and the characters got to that point in the story.

It is also critical that email users understand that they should NEVER say anything in an email that they would not want their mother to read. And always to resist the temptation to respond immediately and in kind to a perceived slight, criticism, or generally annoying person.

I try to use email judiciously because I am cognizant of the volume of email that our patrons have to navigate through every day. There are several techniques that I employ to encourage our patrons to read my emails. I use very descriptive titles, try to keep the content on one screen (no scrolling), use bullet points and color to highlight important points, and avoid dense prose and attachments that require too many clicks.

And could I ever truly have believed that I gave my all to this job before the Blackberry? Now at 5:00 AM in the morning, or 11:00 PM at night, on Saturday, Sunday and holidays, in my kitchen, on my commuter bus, around the country (at least wherever there is service), I can hear the comforting sound of my Blackberry vibrating. Perhaps it really is time to find a hobby...

Note: I recommend that you read this very practical article about managing email: Kennedy, Dennis “E-Mail Enlightenment,” 13 *Law Office Computing* 68 (Oct/Nov 2003).

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TWENTY-THREE YEARS IN A PHILADELPHIA LIBRARY

by Jan Brown, Montgomery, McCracken, Walker & Rhoads, LLP
Philadelphia, PA

I have a confession to make. I was a computer phobe. I've now been at Montgomery, McCracken for twenty-three years; and when I started, there was a Lexis Deluxe terminal inside the library door. It didn't get much use, and I was asked only occasionally to retrieve something from it. On those rare occasions, I would get so nervous that my hands would shake. I was sure some terrible thing would go wrong. Of course it never did, and eventually I relaxed about it.

Soon we moved on to the little, red UBIQs, but the materials available were nothing like what we have now. In those days, *U.S. Law Week* was the first source for Supreme Court opinions; and it usually arrived in about three days. If we needed an opinion more urgently, we called a document service in Washington and had the opinion FedExed to Philadelphia. I worried about that, too, in case it didn't arrive on time or it cost too much. We went through the same process to get any other document, such as an SEC filing; and I went through the same worries.

Interlibrary Loan was less intimidating than the other things, but it was still very different from what it is today. Almost every day we borrowed reporters and law reviews we didn't have. We had to send a messenger to retrieve the books. Today we still depend on Jenkins Law Library, but in different ways. Of course, we still borrow treatises we don't have and things like Pennsylvania county reporters; but Jenkins now has a book-pulling service and a messenger service, and the whole process is simpler. We also make constant use of Jenkins' Web site not only for JAC, its catalog, but also for such things as prepared Pennsylvania legislative histories, easy access to other library catalogs, legal periodical indexes and Hein On-line. We pay membership dues and other fees now, but the range of services is so much broader than it was in the "old days."

ILL was more limited in those days, too. It wasn't so easy to find out what was available, and we were pretty much limited to local libraries

as suppliers. I had a wonderful assistant in those days, and she spent many hours traipsing all around the city to various places like Penn and Temple to copy articles that we needed. Although I still miss Katie, it's all so different now. It's also much more extensive because it's so much easier to find out what exists, and with the help of OCLC and faxes to borrow from anywhere.

About seven years ago our firm moved into a new building, and the library was assigned a different kind of location. In the old building, we were in a central location, and the library was a hub of activity. In this building, we are alone on the top two floors. I can truly tell you that it's lonely at the top. We have so many fewer people coming up here now. As we all know, the physical library isn't the nerve center it used to be, for so many different reasons. And, yes, we have lost space to make way for conference rooms.

In spite of our new location, we are still in constant contact. Oh, what would we do without e-mail? So many requests come to us that way, and so many answers can be provided that way. Not all of course, but I think it is still a good idea to appear with the results and to keep people aware of your presence.

I've gotten this far, and I haven't even mentioned the Internet or intranets or the other tools at our disposal. I take them for granted as we all do.

The world of my library now is vastly different from the library of late 1980 when I began at MMWR. The tools I use are much more extensive, and the methods I apply have changed, but some things remain the same. It's still about organizing and disseminating information and providing the best service that I can to my attorneys. Finally, my worries are different, but I don't let them get me down the way they used to.

Lexis Full Page Advertisement

TOWARD THE VIRTUAL LIBRARY

by Lori Tarpinian, Mintz, Levin, Cohn, Ferris, Glovsky, and Popeo, PC
Boston, MA

In 1992 I became the Director of Library Services for Mintz Levin, a law firm with offices in Boston and Washington, D.C. Resident in the Boston office, my job entailed managing three local staff people and a budget of \$350K. I was responsible for providing services to approximately 175 attorneys, while a colleague in the D.C. office assisted the firm's Washington attorneys. She and I collaborated occasionally but for the most part we took care of our 'own' offices. The firm's catalogs were already electronic, but each office used its own unique homegrown product. Collection development was also done locally; and while we were friendly enough, the D.C. librarian and I rarely backed each other up on workflow.

The firm was fortunate to be led through the early 1990s by a managing partner who was truly a visionary and who accurately forecasted many trends present in the legal industry today. Among the library services trends he envisioned was the change to largely electronic collections; he would regularly talk to me about the virtues of the "Virtual Library." Well, even though I was as computer savvy as the next librarian, I remember researching that concept just to be sure that I understood what he was talking about. He was well ahead of his time, even as early as 1992 wanting to get rid of all the books! You and I know that the electronic products and environments available in 1992 were not reliable enough to do that, not to mention the fact that most of his peers would hear nothing of such an idea. And yet, today, just over a decade later, much of what he foresaw has become reality: we do not subscribe to any hard copy reporters; we removed most Shepard's and Digests long ago; we have very few treatises in duplicate and we retain very little of our periodical collection beyond a few months.

Over the past eleven years we have made tremendous strides toward achieving the "Virtual Library," and my staff and I have adapted the services that we provide to reflect the rapidly changing technologies, as well as the changes in the business and legal arenas. The firm's rapid expansion over the past five years now requires us to provide services to more than 450 attorneys and senior professionals in seven offices, including west coast and London offices.

I was recently asked "what exactly has changed in my private law firm library over the past 11 years?" My reply was another question: "What hasn't?"

Gone are the days of relying on Westlaw and Lexis as the only electronic sources. Over the last decade we have been challenged to work with and integrate continually changing media and growing content – software upgrades, CD-ROMs locally, CD ROMs on the network, CD towers etc. Finally we have been brought to an environment with some common interface that we can wrap our arms around – the Web. Currently, my firm has over 75 electronic products available to lawyers and staff at

the desktop, with 95% of them being web based. Through the firm's intranet our end users can read our policies, access research guides, place orders and access answers to common questions through our FAQs section. Developing these tools has made our roles more interesting, freed us up to do higher level work and demanded that we be technically savvy.

With all of this content available at the desktop, we do have less traffic in our physical space today than we did in 1992, but our positions are just as necessary today, if not more so, than they were back then. Simply stated, we possess a much more elaborate skill set and handle more today than we ever did in the past.

While end users are much more independent than they were in years past, sophisticated search inquiries, including "needle in a haystack" requests to which we regularly respond, and the value added content the library staff provide are heavily relied upon and greatly appreciated. My reference staffs provide specific, actionable information to our attorneys to assist with all of their legal and business development dealings. We are working on a much higher level than we were in 1992. Obviously, these are the changes that have made our jobs so interesting. And yet, while more interesting, in many instances we find that the research process is longer. Knowing where to stop is a decision that a reference librarian makes many times a day, and knowing when to stop is a valuable skill that librarians possess.

Today the wealth of information that we find can be distilled more easily and we can deliver it anywhere in the world at anytime of day. With new technology, improved delivery mechanisms such as public folders, alert services, automatic distributions, web based research tools and catalogs, the collaboration among our offices (we are now in London, New York, New Haven, Reston, Los Angeles, in addition to Boston and D.C.) is terrific. We have grown so much over the past eleven years, that it's hard to keep up with the people – fortunately, this does not impede our ability to deliver timely, nicely formatted, content rich information. Today we have a library staff of 9 and a significantly larger budget. The firm's expectations of service delivery have required important changes in the skills of the department. We engage in regular professional development and continually improve our expertise to keep up the expected pace. We have also significantly enhanced the way we work among offices.

Prior to the events of 9/11 we had plans to expand our staff dramatically and to include specialists, and we will do that as soon as the economy shifts and improves.

While e-mail has improved our productivity and web-based technology has dramatically changed and improved our services, today we have the

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added burdens of managing thousands of passwords to hundreds of products, providing more training and working with vendors on licensing issues. Burdensome no doubt. However, managing this data has allowed my staff and me to build databases to manage it; this has been fun and challenging work and has further broadened our expertise. We now have an Electronic Services Librarian.

There is still loose-leaf filing to be done, and there are books to be reshelfed and materials to be routed in hard copy. Books are still lost and

cataloging and processing continue to be necessary. However, we are business people, we've become better negotiators, we participate in the firm's best practices, and we sit on Technology Committees. Today's successful librarian is a strategic business professional who adds to the bottom line profitability of the firm and responds to the needs of the regularly changing economy and social climate.

Wisconsin Tech Search Half Page Advertisement

A HISTORY OF THE PLL-SIS

by Sarah Mauldin, Lionel Sawyer & Collins
Las Vegas, NV

The objective of the Private Law Libraries Special Interest Section (PLL-SIS) is to “improve the quality and service of private law libraries by emphasizing their goals, needs and special interests and to represent its members’ interests and concerns within the AALL.” The SIS fulfills this mission every day through the work of volunteers who participate as leaders and members of committees.

The private law libraries of AALL were first officially organized at the 1959 Annual Meeting after a round-table discussion entitled “The Problems of the Private Law Librarian.” AALL set up the Private Law Libraries Committee, which was the immediate predecessor of the PLL-SIS.

The PLL-SIS itself came into existence after the reorganization of the AALL committee system in 1976-1977. According to Joy Plunket, the first Acting Chair of the SIS, the vote to form the group came at an after dinner meeting in Boston where a record number of members voted in favor. It was one of the eight original special interest sections approved at the annual meeting in Toronto, Ontario, and held its first meeting as an SIS on June 26, 1977.

At the inception of the SIS system there was discussion of what to call the new groups. Jack Ellenberger, AALL President 1976-1977, wanted Special Interest Sections, the same term used by the Special Libraries Association. Morris Cohen, AALL President 1970-1971, preferred simply Sections as used by the American Bar Association. After a friendly, though lengthy, argument, Special Interest Sections won the day.

The SIS is now AALL’s largest, with a membership of over 1,600 firm, corporate, and independent law librarians. It comprises more than 1/3 of the membership of AALL.

As the section grew larger, librarians with more specific concerns came into contact. Through meetings and collaborations, some of these groupings have evolved into PLL subsections. Presently, the PLL-SIS sponsors four groups and three caucuses under its auspices. The groups are the Corporate Law Librarians, Independent Law Librarians, Records Management Law Librarians, and Technical Services Law Librarians. The Caucuses are Intellectual Property Law Librarians (begun in 1996) and Solo Law Librarians and Multi-Location Libraries (both begun in 1997). Each of these groups and caucuses gathers at some time during the annual meeting. Funds for special projects of these groups come from the SIS and must be approved by the PLL-SIS Executive Committee.

The Corporate Law Librarians began as an informal group organized at the 1986 annual meeting by Peggy Butler to discuss problems and concerns common to librarians working in a corporate setting. Members generally work for either a corporation’s legal department or the corporate department of a law firm library. They deal with specific problems of running a law library in a corporation, such as managing both the records center and the library or dealing with SEC regulations. One of the

publications of the group is *The Value of the Corporate Law Librarian*, written to present to the AALL Task Force on the Value of Law Librarians in the Information Age.

The Independent Law Librarians are free lancers, consultants, filing services, information specialists, and others who work with law libraries and legal materials but who have some type of employment other than a single, permanent full-time position.

The Records Management Law Librarians group began meeting informally at the 1990 annual meeting in Minneapolis and was formally recognized in 1993. Members are librarians who are responsible for managing records and conflicts in their firms and corporations. At the annual meeting, the group regularly sponsors educational programs, and it sponsored a full day workshop on basic records management at the 1998 meeting.

The Technical Services Law Librarians have as their objective the improvement of standards of bibliographic control in law firm libraries, and introduction of automation and technology into the working environment of law firms, where the small size of the collection often does not warrant the sophisticated systems developed for larger collections.

The Intellectual Property Librarians are librarians who work in firms that have intellectual property practices. They meet to share resources and keep each other up to date on the changes in the practice.

The One-Person Library Caucus was formed in 1997 to focus on the concerns of individuals who serve as the sole professional in their library or branch. The group works to identify resources that help solos work more efficiently. They meet for mutual support and encouragement.

The Multi-Location Libraries Caucus focuses on the concerns of managing multiple location libraries.

These caucuses are in the organizing stages of development, and may, at any time they desire, petition the PLL Executive Board for official recognition as a PLL Group once their continuation is deemed of interest to the Section as a whole.

PLL-SIS sponsors a substantial number of programs and workshops at the AALL Annual Meeting. It also exhibits and sponsors educational programming for the annual meeting of the Association of Legal Administrators. The SIS works closely with AALL to promote law librarianship using materials such as the AALL Tool Kit, created a New Members Packet to welcome newcomers to the Section, and has prepared a brochure focusing on standards for private law librarians. The SIS is active financially by underwriting the costs associated with the AALL Representative to the American Bar Association Law Practice Management Section and funding scholarships and grants to assist members in need.

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NEWS FROM THE CHAIR OF THE RECORDS MANAGEMENT GROUP

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

The biggest news in legal records management is publication of the substantive treatise entitled *Records Management in the Legal Environment: A Handbook of Practice and Procedure*. Five years in the making, the book is available for sale on the website of ARMA International, at http://www.arma.org/bookstore/product_detail.cfm?itemID=1389 at a cost of \$89.00 for ARMA members and \$129.00 for nonmembers. I welcome the feedback and comments of all of my professional colleagues on this new reference work, which has been such a huge part of my life for so long!

Law librarians who recently have been given responsibility for records and/or conflicts management in their organizations should register for a subscription to the legal records management listserv. AALL hosts this listserv for the benefit of all legal records management personnel, even non-AALL members. Log on to http://share.aallnet.org/read/all_forums/subscribe?name=pll-legalrec-sis to sign up.

It's not too early to start planning for professional development activities in 2004, especially if you are asked to submit budget information for conferences you want to attend. A program proposal submitted by the Records Management Group for AALL in Boston in July has been

accepted. This 60-minute program, coordinated by Lee Nemchek, will feature Gitelle Seer, Director of Library Services at Dewey Ballantine, speaking on legal and business research for conflicts searching. In recent years, management of the conflicts of interest department has emerged as a major trend among private law librarians in both large and small law firms. This program, which was successfully presented to an audience of legal records managers at the annual ARMA Legal Pre-Conference in October 2003, will focus on specific strategies that librarians use when researching potential conflicts of interest among parent and subsidiary companies and other complex entities.

Additionally, the ARMA Legal Pre-Conference for 2004 will be held in Long Beach, California next fall. This two-day extravaganza is the premiere educational opportunity for legal records managers in private law firms and corporate law departments. I can't stress strongly enough the value of attendance at the Legal Pre-Conference, even if you can't attend the whole ARMA conference. As more and more law librarians are entering this area of law firm operations, the opportunity for networking with other librarians who face similar job challenges is a major incentive for participating in this event. I challenge all of you to convince your administrators that attendance is critical, and I look forward to seeing you next fall in Long Beach.

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In addition to these projects, the Section created a Strategic Plan in the fall of 1996 that guided its activities until the year 2000. This plan identified six initiatives targeted to addressing the needs of the private law librarian, both within AALL and within the larger legal and librarian communities.

Standing Committees include Bylaws, Education, Grants, Mentoring, Newsletter Advisory, Nominations, and Public Relations. Additional Task Forces and Ad Hoc Committees are formed as needed.

The Section issued its own newsletter from 1978 to 1982, from 1985 to 1987, and from 1989 to the present. The current publication, *PLL Perspectives*, is quarterly, and is available to all section members as part of their membership.

The Section's webpage, at <http://www.aallnet.org/sis/pllsis/>, was first created in 1997 and is updated on a regular basis.

- Adapted from the AALL PLL-SIS Procedures Manual
- Special thanks to Marie Wallace and Joy Plunket for the insights they provided for this article.

GSI's Full Page Advertisement

WANTED: LEADERSHIP FOR PLL

by Christine Graesser, Brown Rudnick Berlack Israels
Hartford, CT

We have a little problem in the Private Law Libraries SIS. The problem is a lack of volunteers for leadership positions within the organization. This problem is most glaring on the national level. I am on the AALL Nominations Committee; and although we tried hard to recruit private law librarians to be candidates for the Executive Board this year, we ended up with only one. This is pretty shocking, considering that privates comprise a majority of AALL members.

Private law librarians often complain about the domination of academics in AALL, how programs seem more often to address law school library issues and how the leadership of AALL is overwhelmingly academic. It is obvious that if leadership leans toward one branch of a profession, that branch will get better representation. The response of many librarians has been to defect, as it were, to SLA, or at least join SLA in addition to AALL and choose to attend SLA meetings.

We can't blame the academics for lack of representation in AALL. We need to look to ourselves and our employers.

I will share my personal experience as an illustration. I've been a law librarian since 1981. While I was a lowly assistant librarian, I had no hope of attending the annual meeting when it wasn't in New York, where I was working. My law firm wouldn't foot the bill for anyone other than the library director, even though fledgling librarians get as much or more out of annual meetings. Although I got along well with my boss, the head librarian, it didn't even occur to her to lobby for me to go; and it didn't occur to me to ask for the privilege.

Later on, when I worked for a library-contracting firm, my boss did fund some attendance to national meetings, even though her business had a slim profit margin. She had the foresight to understand the benefits of professional development in all of her employees, regardless of rank.

I was a library director for three years before I got up the nerve to ask to attend the national AALL meeting. My law firm said yes without hesitation, leaving me feeling foolish that I hadn't brought it up before.

When I transferred to my current position as a branch librarian, I was nervous that my annual meeting days were over. However, by then I was heavily involved in an AALL committee, and made a point of telling my

employer; so they continued to foot the bill, as they did for most of the library staff. In 2003, all professional development out of state travel for attorneys and support staff alike was curtailed as a budget tightening measure. I attended AALL's Annual Meeting in Seattle this year thanks in part to the generous travel grant from the PLL-SIS.

My point is that librarians need to inform their employers of the importance of professional networking and continuing education. We are often too passive about asking for professional development funding, wanting to create an impression that we are thrifty. Being a cheap date doesn't necessarily get you respect. If employers don't see their librarians making professional development a priority, can they be blamed for not thinking of librarians as more than glorified clerks, satisfied with the status quo?

One of my biggest challenges as a library director was to be able to hire qualified professional staff at decent salaries. I realize now that I should have promoted the professional development of my staff as a demonstration to my bosses of the skills and education requirements of the library staff, as well as the director.

The same goes for leadership. Librarians are not traditionally considered leaders in their firms. Opportunities for leadership roles within a firm are rare for librarians, but many intrepid souls manage to establish their leadership credentials despite the lack of encouragement within a firm. Leadership in one's professional association provides the platform upon which librarians can develop the skills and confidence that can be applied to their roles within their firms or companies.

I can tell you that my greatest growth as a librarian has come through leadership roles in AALL. Looking back, I know that if I had had those experiences to draw upon years ago, I would have done a better job in meeting some management challenges as a library director.

Talking with some prominent law firm librarians about their professional leadership activities, I found that most observed that their firms prioritized professional involvement for all professional employees. Knowing these people, I also believe that they did not hesitate to share with their employers their commitment to the library profession and that commitment is mirrored in their outstanding service to their firms and companies.

THE AALL MENTOR PROJECT WANTS YOU!

The AALL Mentor Project:

- Provides an informal, personal source of information for newer members
- Provides an avenue by which experienced law librarians may meet promising new members of the profession
- Provides a network for members who are contemplating a move to another type of library

Who should participate?

- All experienced law librarians willing to share their time and wisdom
- All enthusiastic newer members
- AALL members considering a move to another type of library

Comments from the 2003 mentee survey:

- It was a wonderful opportunity to meet an interesting and enjoyable person in the profession.

- I feel that [my mentor] will be a good resource in the future.
- I was delighted to have [my mentor] and think he was just the perfect match.
- Overall, spending time with my mentor was one of the highlights of the AALL convention.

PLL member Sarah Mauldin participated as a mentee in 2003:

- My experience with my mentor has been great. We are both in similar situations and I know that I can always turn to her for advice and encouragement. — Sarah Mauldin, Director of Library Services, Lionel Sawyer & Collins

How can you join the Mentor Project?

To learn more about the AALL Mentor Project and to become a mentor or mentee, visit our website at: http://www.aallnet.org/committee/mentoring/mentor_project.html

Mentors and mentees will be matched as closely as possible based on submitted applications.

THE CALL FOR PAPERS HAS BEGUN

Have you been thinking of writing an article of interest to law librarians? Maybe you just need a push to get started? Whether for fame or for fortune, this is your chance to enter the AALL/LexisNexis™ Call for Papers Competition.

The AALL/LexisNexis Call for Papers Committee is soliciting articles in three categories:

- Open Division for AALL members and law librarians with five or more years of professional experience
- New Members Division for recent graduates and AALL members who have been in the profession for less than five years.
- Student Division for budding law librarians still in school. (Students need not be members of AALL.)

The winner in each division receives \$750 generously donated by LexisNexis, plus the opportunity to present his or her paper at a special program during the AALL Annual Meeting in Boston. Winners papers will also be considered for publication in the Association's prestigious Law Library Journal.

For more information, a list of previous winners and an application, visit the AALL website at http://www.aallnet.org/about/award_call_for_papers.asp. Submissions must be postmarked by March 1.

If you have any questions, please contact any member of the AALL/LexisNexis Call for Papers Committee, Kathryn Hensiak, k-hensiak@law.northwestern.edu or Virginia Davis, Davis@UH.edu

COMMITTEE CORNER

AALL 2004 PLL SPONSORED PROGRAMS

by Jenny Kanji, LexisNexis Librarian Relations Group
San Francisco, CA

As the program co-chair I'd like to say it was an honor and privilege to choose among so many interesting proposals. We are pleased that the Annual Meeting Program Committee selected six of the programs submitted from PLL. These programs address all ranges of competency from information technology, management, reference and public relations. We would like to thank all those who submitted the programs and ask for your continued support.

Please mark your calendars and plan to attend the following programs.

■ **A-2, Sunday, July 11, 10:15-11:45 a.m.**

Delivering Documents to Mumbai: KM Strategies and Software for a Global Legal Environment

Because KM is so new to many law librarians, most available information on this topic is either hearsay or theoretical. The speakers will give practical, "real life" examples of what procedures best foster information sharing and what types of software are available to meet legal institutions' KM needs.

■ **K-1, Wednesday, July 14, 3-3:30 p.m.**

Reaching the Global Patron

Law librarians must frequently provide reference service to patrons outside of the physical library. Delivering results in a format that is easy for the patron to use can be difficult. Adobe Acrobat is an excellent tool to help deliver research results electronically to anyone anywhere! The speaker will discuss when to use Acrobat and demonstrate the basics of creating PDFs, book marking, combining files and grabbing web pages.

■ **C-1, Monday, July 12, 9-10 a.m.**

Legal Research for Conflicts Searching

At the 2003 Annual Conference in Seattle, management of the conflicts of interest department emerged as a major trend among private law librarians in both large and small firms. This program focuses on specific strategies that librarians use when researching potential conflicts of interest among parent and subsidiary companies and other complex entities.

■ **I-4, Wednesday, July 14, 1:30-2:00 p.m.**

Unraveling the Mysteries of the Required SEC Filings of Foreign Companies

Foreign companies doing business in the United States are required by the Securities and Exchange Commission to make periodic filings similar to those required of United States companies. Why doesn't a foreign company file a 10-K (annual report)? Is there an equivalent to an IPO filing? What is in the foreign filings? These are just a few of the questions that an expert researcher will answer in this program.

■ **E-4, Tuesday, July 13, 9:00-10:00 a.m.**

The Gumshoe Librarian

The growing power of computers and the expansion of commercial databases have made it quicker, cheaper, and easier than ever before for anyone to collect information that took our gumshoe predecessors weeks of dogged surveillance and research to piece together. Come join the experts as they reveal their strategies for locating people, public information and hidden resources from all parts of the world via the Internet.

■ **D-6, Monday, July 12, 4:15-5:15 p.m.**

Legal Information to the World – Marketing Library Research Services to Multinational Organizations through Training Programs

In response to a Europe without borders and Asian trade, law firms and corporations merge forming multinational organizations. Librarians in law schools, firms and legal departments market services to attorneys from varied legal traditions, educational and cultural backgrounds and language skills. In this program, law librarians for the US office of a multinational firm will discuss how they conduct library tours, orientations, and training programs taking these multinational differences and expectations into account.

It is always a challenge to develop programs that are interesting and practical. We believe that these programs provide valuable information and stimulating experience. See you in Boston!

BNA
Full Page Advertisement

NEWS FROM THE PLL-SIS TRAVEL GRANTS COMMITTEE

It is not too early to be thinking about AALL 2004 in Boston. The PLL-SIS Grants Committee awards travel grants to the annual meeting. You will find the grant application at the PLL-SIS website: <http://www.aallnet.org/sis/pllsis/commgrp/grantscomm.html> or you may contact me for a copy if you wish to apply. Completed applications, including personal statement and two letters of recommendation are due April 2, 2004. You must be a PLL-SIS member to be eligible and prior recipients may apply. As a grant recipient you will be asked to write an article for PLL Perspectives and be introduced at the PLL-SIS Business meeting held at the AALL annual conference. You will also be introduced at the PLL-SIS luncheon held at the annual meeting. Both the Business Meeting and the Luncheon are held on Sunday. You will also be introduced to the representatives of Global Securities Information, the generous providers of the travel grant funds. Check out this opportunity; apply for an AALL travel grant. Please send completed applications to me at the address below. Email me if you have questions or need additional information.

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