

PLL PERSPECTIVES

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

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SHIP IT, SHIP IT REAL GOOD, A.K.A. HOW TO SUCCESSFULLY RETURN UNWANTED MATERIALS TO VENDORS

by Terry Psarras, Balch & Bingham LLP,
Birmingham, AL

STOP ME IF THIS SOUNDS FAMILIAR. You are going through the mail, and you realize that you have gotten something you did not expect. What do you do with it? What can you do to avoid or reduce the number of similar occurrences in the future?

There may be several reasons for your receipt of these unwanted goods. Sometimes a vendor may send you something you haven't ordered, hoping you will either purposely buy it or not realize what has happened and accidentally approve payment. Another reason these days is extreme confusion on the part of the vendors. With the amazing string of mergers and consolidations and transfers of titles, vendors have been getting holdings records from other vendors. As these records are sometimes outdated, you may receive a supplement to a title you have not owned since the Stone Age. Certain publishers have the annoying habit of sending unsolicited "companion" materials to titles you already have. Sometimes they split a title in two or more and assume you want the new titles, so you end up paying double for the same materials, just split into pieces. In any case, you are left with the materials in your hands and a choice to make. Do you keep, return or discard the unwanted, unordered, unsolicited materials? What you do depends on you and the specific circumstances which have brought that item into your library. What follows are several suggestions for steps you can take to alleviate these kinds of situations.

PROACTIVE MEASURES

Just Say No—Be aware of the prepared speech. Not all the materials we need to return to vendors are unsolicited. Sometimes when a telemarketer calls, we have a hard time saying no. As a result, we let them ship us their product, and then we have to go

through the effort of returning it. While it may be hard and uncomfortable to say no, remember all the hassle you will need to go through in order to return it. No becomes a bit easier to say.

Reject Automatic Shipment—In the initial order forms, some companies include check off boxes where you can declare that you do not want future supplements and/or related materials. If you are placing an order over the phone, you may want to make that clear to the vendor because some of them may automatically put you on for updates.

Ask for Literature—A lot of times, when faced with telemarketers, I tell them that we do not want to look at the product at this time, but I would love to see a brochure or flier on it. In my opinion, if a telemarketer is really serious about selling you a product which will be useful to you, he will do what you ask and mail or fax you some information on the product. If she does not, or says thanks and hangs up on the spot, oh well.

Consider Trial Periods—Most publishers offer their products on a 30 to 60 day trial. They will usually pay to have the product shipped back to them. Purchasing this way is sometimes really useful. On the other hand, purchasing material on trial means you have to look at it, keep track of it, process it, and then return it (if that is what you are going to do). Having a clear policy in your firm about accepting products on trial can be helpful. Have Telemarketer Calls Directed to the Library - If there is anything more infuriating than having to return something you haven't ordered, it is having to return something ordered by a sometimes unsuspecting attorney. As telemarketers call librarians, attorneys, administrators and everyone else, having a clear policy that all calls should be transferred to you can save you a lot of grief. You could even take it a step further and say that if an invoice does not come through you, it does not get paid. *continued on page 4*

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FROM THE CHAIR

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

ARE WE HAVING FUN YET? How many times have I said this sarcastically? Probably too often and probably without thinking about where the fun really is in our work. Six months have passed since the Baltimore AALL meeting. In that six months, I have assumed several new jobs - Manager of the Library, File Services and Conflicts departments at Holland & Hart and PLL/SIS Chair. The first three hats I have assumed are employment related and are challenging, especially starting at a new firm. But if the environment is right, this passage can be downright fun; and it is. When you started a new job, remember how you got to imprint your own style and show your librarian's savvy. Think about how good you feel now when you are treated as an in-house expert. You feel revitalized. You realize that others see you as an innovative information provider. There is pleasure in such recognition. You have shown how deep your knowledge really is and, at the same time, marketed your value.

I have just finished writing an article for a special issue of *Legal Reference Services Quarterly* which Linda Will, as guest editor, is putting together. The theme is the "Private Law Librarian in the 21st Century." My subject is librarians' relationships with employers. I enjoyed pulling together my thoughts on how law libraries have changed in the last thirteen years and how we have to envision ourselves today and in the future. The article was fun to write and owes a lot to the AALL Task Force on Values' study and its contribution to the AALL Tool Kit. Private law librarians learned from the Task Force's work that we must be a vital part of the firm's or corporation's mission. We must make them aware that we are an essential element in saving the firm money and in helping them make it. We also must let them see that private law librarians are leaders in other ways. Our value lies not only in budgeting and managing collections but also in being creative in our thinking. How many of us have taken some risks by asking our employers to think way outside the box on various issues? Have you rewritten your own or your staff's job descriptions lately? Have you included the expectation that law librarians must attend both library and non-library related educational programs? Do you list as another "duty" that we actively participate in professional activities?

Our creativity should know no bounds. Why not challenge management by asking what vision they have for the firm's staff? Offer to be the catalyst that helps discover it. Most firms or corporations have a strategic plan for their lawyers. Why not help create a strategic plan for staff? Sure, you may risk a little; but the reward is the increased visibility of you, the law librarian, as a person of vision outside the traditional focus of librarians as book custodians.

As a volunteer, being PLL Chair has brought me mountains of personal enjoyment. I have gotten to know law librarians from all parts of our organization. I talk regularly with staff at AALL headquarters who patiently answer my myriad questions and are

responsive to my needs. Did you know that AALL headquarters staff forwards all questions that deal with private law libraries to me as PLL Chair? I had no idea how often these sometimes simple and sometimes complicated requests come to our organization. To AALL headquarters, I have assumed the guise of instant expert on all private law library matters. I have begun recording each of the requests and their solutions so that they may be included in a "sharing best practices" article or brochure which is a PLL Strategic Plan initiative.

I also have responded to such thorny issues as misguided salary surveys and conflicts with vendors. How do I know how to deal with these questions? Certainly, I do not know all the answers. But, as a librarian who has been trained to find information, I use my basic research skills. In addition to searching my collection or a database, I have called for help from you, my colleagues, and have not been disappointed.

Another benefit of being PLL Chair is getting to know so many people in so many places. PLL members are experts in many, varying areas. The volunteers who make up the PLL committees are a fantastic source of talent in providing advice to my questions and to our entire organization. I hope that you have noticed that *PLL Perspectives* is bringing you more substantive articles on issues such as consumer advocacy. The members of the PLL Consumer Advocacy Committee are delving into new territories with vendors and will be bringing you practical solutions. The PLL webpage grows constantly with the addition of SIS news and substantive articles and reviews of products. The communication among our members is the best indication that this profession is very much alive and thriving. I am simply awed by the collective knowledge law librarians have. I urge you all to be active members of PLL and AALL. It is a rewarding experience.

When we reflect on the real reasons we are private law librarians, we have to include the intellectual challenges we face every day in providing quality information to our employers. But, there is also the communicating that we do personally and remotely with our colleagues that brings us satisfaction. Does this mean that being a private law librarian is 24 hours of fun each day? No, we each have time consuming and challenging work that needs to be balanced with real life. However, if there is no joy in our jobs, it is time to rewrite the script. Each of us must sometimes make changes along the way. It may be a new job or the revamping of an existing job. It may be the decision to volunteer for PLL. As private law librarians, we have common goals and interests that bring us together. E-mail and listservs make communication easier. We can share with one another not only best practices but also our own personal visions and friendship. I have fun being a law librarian even if the going is stressful at times. Life really is too short to spend it unhappily. Make the best of your job, share your talents with your colleagues, and have some fun!

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Although this can sometimes be difficult to achieve in a firm, it can still be a useful tool in your fight.

REACTIVE MEASURES

If, despite your best efforts, you now have something in your hands which you do not want, here are some of your options.

Send back—Traceable—Remember that sometimes (especially if you are looking at something you got through a telemarketer) you can return materials at no cost. Unfortunately, that is not always the case; so be prepared to pay. I recommend using a traceable method, so the vendor (who sometimes takes weeks or months to process the return) cannot claim it has not received the goods. Take your choice of carriers. Just make sure you can trace the fact that someone at the other end received and signed for your shipment. I personally use the U.S. Postal Service and send things certified. I definitely feel that the added cost is worth it.

Return using the vendor “forwarding and return postage guaranteed”—Certain publisher packaging is marked “forwarding and return postage guaranteed.” If you catch something quickly enough to save the packaging in decent shape, you can use it to return materials.

Consider the materials gifts and do not return them—As you may already know, there is a section of the United States Code which deals with this scenario. Section 3009 of Title 39 of the

United States Code deals with mailings of unordered merchandise. Read the entire section and pay special attention to subsection (b), which reads

Any merchandise mailed in violation of subsection (a) of this section, or within the exceptions contained therein, may be treated as a gift by the recipient, who shall have the right to retain, use, discard, or dispose of it in any manner he sees fit without any obligation whatsoever to the sender. All such merchandise shall have attached to it a clear and conspicuous statement informing the recipient that he may treat the merchandise as a gift to him and has the right to retain, use, discard, or dispose of it in any manner he sees fit without any obligation whatsoever to the sender.

As you can see, the law allows you to treat unsolicited materials as gifts. You can keep, use, throw away, no problem right? Unfortunately it is not so easy as the law makes it sound. While the law is pretty clear, some publishers have found ways around it by the threat of non-cooperation. This threat has become especially troublesome recently, with the publishers acquiring subscription records of other companies.

Recently, a large publisher, which had acquired another publisher and was using its records, sent a supplement to a title that a law firm had canceled years ago. When notified by the law librarian that the supplement was going to be kept, as per 39 USC 3009, the publisher was not very happy, and responded that if the law firm did that, its entire account would be put on a written authorization for each shipment basis instead of its usual automatic shipment. Faced with the prospect of having to deal with literally hundreds of written authorizations for every single shipment of every single title, the librarian relented. Since the number of subscriptions was quite large, the threat was quite real. This tactic may work better with smaller vendors than larger ones.

Trash it and forget about it—I have been known to do this if I was especially upset with a vendor, but I do it rarely. I do not particularly recommend this step since trying to remove the charge without mailing back the disputed product can drag on forever.

THE AFTERMATH

Be aware of each vendor’s “personality.” Each vendor is different. Some are very efficient in crediting your account when you return something, while others take months. Keep that in mind as you receive account statements and possibly multiple copies of overdue notices, and act accordingly.

Keep copies of all documentation. Make a copy of every document involved with your sending back of materials. I keep a file of everything involved, and every few months I go through and clear it out.

Returning solicited or unsolicited materials can be a time consuming, stressful and frustrating experience. By following these basic tips, you may make it a bit less so, and you will have taken a step towards being more in control of your orders and collections.

AALL CANDIDATES RESPOND TO PLL QUESTIONS

TWO DISTINGUISHED AALL MEMBERS are candidates for the office of AALL President this year: Margaret Maes Axtman, Assistant Director for Collections and Public Services at the University of Minnesota Law Library, and Alvin M. Podboy, Jr., Director of Libraries at Baker and Hostetler, LLP in Cleveland. In order to give PLL members some idea about the positions of each candidate, the PLL Executive Committee posed the same four questions to each, and their answers are presented here along with very brief biographical sketches. We hope that these thoughtful responses will provide some assistance to our members in choosing between two very able candidates.

MARGARET MAES AXTMANN

Assistant Director for Collections and Public Services,
University of Minnesota Law Library

EDUCATION

M.A. University of Denver
B.A. University of Wisconsin-Green Bay

AALL ACTIVITIES

Editor, Price Index for Legal Publications, 1996-
Chair: Special Committee on Ethics, 1997-1998;
Member: Executive Board, 1992-1995;
Member: Task Force on Strategic Partnerships, 1995-1996;
Member: Special Committee on the Renaissance of Law
Librarianship in the Information Age, 1994-1996;
Chair: Strategic Planning Committee, 1994-1995;
Chair: Long Range Planning Committee, 1993-1994;
Chair: Education Committee, 1990-1991;
Chair: Nominations Committee, 1989-1990;
Chair: Committee on Relations with Publishers and Dealers,
1983-1986;
Chair: Online Bibliographic Services SIS, 1987-1988;
Chair: Technical Services SIS, 1981-1982.

ALVIN M. PODBOY, JR.

Director of Libraries, Baker and Hostetler, LLP
Cleveland, Ohio
Adjunct Faculty, Legal Research & Writing and Computer
Assisted Legal Research, Notre Dame College,
Cleveland, Ohio

EDUCATION

MS in LS., J.D.
Case Western Reserve University, Cleveland, Ohio

AALL ACTIVITIES

Chair: Private Law Libraries Special Interest Section, 1994-
1995
Chair: Bylaws Committee 1996-1997
Chair: National Legal Resources Committee, 1992-1993
Chair: Committee on Relations with Information Vendors,
1990-1991
Member: Task Force on the Value of Law Libraries, 1995-
1996
Member: AALL Taskforce on Composition of the Execu-
tive Board, 1994-1995

1. A Managing Partner, Faculty Member, Board Member or a Chief Information Officer is standing in the doorway of your library and drops the following comment. "Now that you have the Internet and CD-ROM, why do you need so many books?" How would you respond?

AXTMANN: I would say, "I'm really glad you brought that up. I've been talking to some attorneys about the use of CD-ROMs and the Internet, and they are running into some of the same issues I've identified. They find these electronic products useful and time-saving for factual research or for obtaining a copy of a specific case. In some instances the electronic sources are also easier to navigate than print products. But we are far from the point of having our users accept a complete electronic library. The World Wide Web is a morass of sites, only a small percentage of which are helpful and authoritative. Web sites and the information in them disappear with regularity. Even CD-ROM products, which can be owned or licensed, do not lend themselves to in-depth research. Legal researchers still sit down and read treatises, both as an introduction to a topic and in the preparation of memos and briefs. They like to have a visual sense of the books, to understand the organization of the material. They want to spread out the various resources they are using, to refer back and forth to them or to compare one case to another. It is

too easy to dismiss this need, when in fact it is fundamental to the way people do legal research. Electronic products will continue to evolve, and research methods will continue to change. But for the foreseeable future our libraries will be a mixture of print and electronic products, balanced to provide the most cost-effective resources with the most useful research tools. We'll need to work hard to provide the funding and space to accommodate the needs of all our users."

PODBOY: I have been here for 20 years, and we have not outgrown the space that the library was originally designed for in 1980. The format of the material that we use is not important. As format has changed, our collection has changed. Historically, when microfilm presented itself, we purchased it and converted hard copy resources to that format. As CD-ROM, online and the Internet have developed, we have continued that process. If you come with me, I will show you how we have changed our collection over time. I will demonstrate to you where we are using other formats for archival, second copy resources and to augment our collection where it is economically feasible. I will also show you that, in some instances, keeping hard copy makes sense. Hard copy resources are oftentimes the most effective way to do research. This is a combination of habit and the way the human mind processes

information. It is also a part of what I call the "Serendipity" factor. The Serendipity factor is also a function of human thought process. It is the situation where you go to a shelf and "find" the right answer by simply putting yourself in the presence of the right tools. Taken to a lower level, the Serendipity factor also is used when you find the correct book and locate the material you need in it. The Serendipity factor is based not only on the correct tool, but also on the experience of the user.

2. Others have been sounding the death knell for our profession for the last few years, and yet, with the avalanche of information, most of us see a need for librarians now more than ever

a) How do we redefine ourselves?

b) How do we continue to inspire and bring new people into the profession?

c) How do we create diversity?

AXTMAN: We are continually redefining ourselves, with the above question being a good example of how we must be prepared to respond to the changing environment. While we do this, we perform many of the same tasks we always have in order to serve the legal information needs of our library users. We still acquire and organize legal materials in various forms, and we provide reference and research assistance to people who need the information contained in those materials. We provide access to information that we do not own, both through traditional interlibrary loan methods and through a vast array of personal contacts and Internet resources. We teach users, both formally and informally, how to do research and where to find information. Increasingly we also create information through our own print and electronic publishing efforts. As a profession we have not been articulate in describing this work, and that is the biggest challenge we face in recruiting new librarians. My inspiration comes from the accounts that I read on law-lib about the events that people plan for student groups visiting the library. When we showcase our work as exciting and challenging, we make librarianship an attractive career choice to people from all kinds of backgrounds. Diversity is a broader and more complex issue, but I believe that we must target our recruitment efforts at a younger audience by working with career services offices at the high school and college level if we want to create diversity in the profession.

PODBOY: A) Redefinition is, I believe, the correct response. Many of us have talked about changing our titles from Librarian to Information Manager, Information Navigator, etc. I believe that Librarian, when properly defined, demonstrates the broadness of our profession. A Librarian is not a caretaker of material. A Librarian is, "an Information Wizard." By this I mean that the Librarian takes the information and develops it into a totally new product. The Librarian, as Information Wizard, processes the material and reformulates it and delivers it to the client.

B) I believe we have to demonstrate the excitement and wonder of the profession. We, as professional librarians, have to demonstrate our love of the challenges that we face every day. We have to be positive when asked about the profession. We have to realistically describe all the things that we love about the profession and

also describe the challenges the profession is facing. When we have the opportunity, we must tell bright, young people that librarianship is a profession you can enter, be challenged by and also make a difference with. We must not be shy about demonstrating our optimism for the future of librarianship. By explaining to young people that we are an integral part of the information revolution, we will encourage them to join us in the wonder and magic of law librarianship.

C) This ties in with the above responses. By demonstrating what "the Librarian" is and by showing our love for the challenges and excitement of librarianship, we will attract the "best" people. Young people of all backgrounds have many options. Today the best young people have the opportunity to "do" virtually whatever they want. It is our job to demonstrate to them that librarianship is one of the options they would love to do. One of the best ways to attract quality young people to our profession is to increase the starting salary and demonstrate through our own leadership that librarianship is not a "limited" profession. We must demonstrate by example that librarians can and do move to whatever career the individual desires.

3. After Baker & McKenzie, all types of librarians began to panic about outsourcing?

a) How can librarians show their value to their employers?

b) How do we convince them that we are THE information experts?

AXTMAN: AALL's Task Force on the Value of Law Libraries produced an excellent tool kit in 1996, partly as a response to the Baker & McKenzie situation, and this is a resource for new and experienced law librarians. Yet outsourcing of library functions remains a viable option for many institutions, and librarians must continually examine how well they are serving the needs of their users. We cannot afford to be complacent about our operations or to think that today's success ensures tomorrow's support. We should be providing the cost comparisons between in-house and outsourced services to demonstrate our value as managers of the library's resources. We ARE the information experts, and we can prove that every day by continuing to collect, organize, preserve and disseminate information both systematically and on demand. Our job is to fulfill those traditional roles while keeping pace with institutions that are struggling with rapid change and emerging technologies. An example of this might be the organization of bookmarks or subdirectories of web sites into categories tied to the library's primary users. That is the traditional organization of resources applied to today's environment. Librarians should understand the culture and business practices of their institutions, and they should be knowledgeable about the work performed. This requires active communication with administrators and library users alike, not just to stay informed but to report on the substance and quantity of the library's work.

PODBOY: First of all, we must know our employers. We must know what their needs are and then we must meet and exceed those needs. To find out what those needs are, we must ask our employers what it is they want. By meeting the needs of our employers, we will demonstrate our value to them. By meeting their needs, we must also anticipate what those needs will be in

the future. This means that we must continue to learn and add to our own value. We must not sit back and watch what is occurring. We must be active participants in the change that is around us. By being the "Information Wizards" of our institutions, we will continue to add value to our employers. By adding value, we are the embodiment of technology. We must not hide. When asked for assistance, we must help. We must remember that we are a service profession. We should relish that service. We must realize that we are a very valuable resource. We not only find information, we create it; we manipulate it; we turn it into something more. We must remind our employers that it is cost-effective for us to find the information or to be the trainers of the primary user. We must know who should do what. And we must demonstrate that knowledge to our employers. One of the effective ways to do that would be to use the ideas in the AALL toolkit. The toolkit gives us the ability to change the perception of how we view our job.

4. Look into your crystal ball and describe law librarianship in the foreseeable future.

AXTMAN: There's a real temptation to do a quick read of the literature on this topic, because greater visionaries than I have attempted to describe the future of our profession. When I look down the road, however, I see a future that is filled increasingly with paradoxes. We will continue to face the demands for more, better, faster and cheaper information, and we will be expected to produce it with fewer staff and decreasing financial resources. Our balancing act will necessitate innovation in processes and services, increased efficiency, systems analysis, retraining library staffs, rethinking the roles of library professionals and paraprofessionals, and almost daily evaluation of our collections in relation to new information products. It sounds bleak, but the future I see is full of opportunities to meet these challenges. Strong internal relationships with other departments will be critical to our survival, and external partnerships with publishers and technology providers will be essential elements of our service mission. The futurists among us have coined numerous clichés to describe our roles: navigator, knowledge manager, team leader, information specialist. I am not keen on labels for people, but I like the image of a library as the nerve center of an organization, where information flows in and out. How we achieve that status is what creates the future of law librarianship.

PODBOY: I see law librarianship as "a moving target." As with any moving target, you must lead the target to hit it. That means we must proactively look at where librarianship is going and try to influence its course. To influence the future of librarianship, we must embrace change. We must love the challenges of change and we must continue to be flexible. To be flexible and to embrace change, we must continue to keep learning. We cannot stand still. We must use all the resources available to us to further our own education, be that traditional learning, continuing education, national and regional programming, or learning on the Internet. I see librarians as embracing their role as Information Consultants. Just as our vendors have changed their role, from salespeople to sales consultants, we must continue to change ours. We must control the redefinition of law librarianship, whatever it may look like in the future.

AALL KALEIDOSCOPE

by Byron Hill, Bowditch & Dewey,
Worcester, MA

ALL '97 was for me a whirl of impressions — traveling by train to an enchanting city, seeing old friends, meeting new friends, having more fun than I would care to admit to my management committee, and learning more than I could begin to convey to the same committee.

The generous travel grant awarded by PLL enabled me to fulfill a dream of taking a lengthy train trip. Riding the Amtrak rails from central Massachusetts to Baltimore was a thoroughly pleasant, yet endlessly baffling, experience.

Baltimore itself was a delight. While I never ventured far from the inner harbor area, what I saw was indeed Charm City — the array of exceptional restaurants, the carousel outside the Science Museum, the water taxis skimming over the harbor, the crabs (everywhere), and friendly people who seemed to enjoy thoroughly where they were living. Even the panhandlers displayed a friendliness and odd ingenuity.

The convention was a superb combination of structured, informative presentations and informal social get-togethers that encouraged a free exchange of ideas. It was wonderful to see old friends again. It was equally delightful to finally meet people who seemed like old friends.

The seminars were both informative and encouraging, demonstrating again and again that the problems I deal with everyday are not unique. We are all coping with the same issues and the same ceaseless change. A special thank you to Robin Mayer, H. Edward Brown, and Darlene Kaskie. Their presentation on managing branch libraries was enormously helpful.

Baltimore '97 was a thoroughly enjoyable and informative week for me. Congratulations and deep thanks to all those who made the 1997 convention a reality. I am already looking forward to Anaheim in 1998. However, I don't think I'll take the train.

INTERNATIONAL FLAVOR OF THE AALL ANNUAL MEETING

by Elaine Apostola, Mirick, O'Connell,
DeMallie and Lougee, Worcester, MA

WE ALL KNOW how great the programs and events were at the AALL annual meeting in Baltimore. My favorite part of the trip, though, was an event on Tuesday night at the Sheraton, where the International Association of Law Libraries held a dessert reception followed by the screening of a mesmerizing foreign film.

The award winning movie, *After the Rain*, is about the centuries-old civil wars that plague Macedonia and its neighbors. The film focuses on three separate but intertwining stories which serve as a powerful warning about the spread of violence and its far-reaching effects. It is the first film made in Macedonia since its declaration of independence from Yugoslavia.

I have to admit that being of Macedonian Romanian descent I was particularly attracted to this movie, but the most enjoyable part of the evening was the warm reception I received from Roberta Shaffer and the other IALL members.

The IALL is a worldwide organization of librarians, libraries, and other persons and institutions attempting to locate sources outside their own jurisdictions. The IALL's basic purpose is to facilitate the work of librarians who acquire, process and utilize foreign and international legal resources. The organization was founded in 1959, and has more than 500 members in 50 countries on five continents.

The *International Journal of Legal Information (IJLI)* (formerly the *International Journal of Law Libraries*) is IALL's official journal. It is published three times a year and reports on "recent developments in law and on activities of interest to legal information specialists." The IALL also regularly sponsors courses in librarianship.

Thanks to the IALL for a memorable night, not glitzy, but a peaceful evening of delicious desserts, warm company and an intriguing movie.

CHAPTER PRESIDENTS' LEADERSHIP TRAINING

by Jan Bissett, Dickinson, Wright,
Moon VanDusen & Freeman,
Bloomfield Hills, MI

CHAPTER PRESIDENTS' LEADERSHIP TRAINING, as well as roundtable discussions designed to address an expressed need for additional training, were made available to chapter leaders during this year's Annual Meeting in Baltimore. Since I hadn't attended an Annual Meeting since 1986, I was excited by the award of a PLL travel grant that facilitated my "expected attendance" as an incoming Chapter President.

Chapter Presidents' leadership training, held the Saturday before the Annual Meeting, consisted of a substantive morning session and afternoon business meeting. It was "substantive" in the sense that information other than administrative requirements was disseminated and exchanged in a series of break out sessions focusing on issues facing all chapters. Talking and exchanging ideas and experiences with other chapter leaders was the most valuable part of the session. Sally Holterhoff, Council Chair, was responsible for this tenth year of training and did an admirable job organizing and handling the communications.

Roundtable discussions led by an AALL leader and executive staff member covering chapter finances, continuing education/program planning, web site/home page management, membership development, meeting management and public relations were also offered to chapter leaders. These new sessions were a result of one of the Ad Hoc Advisory Group on Chapter Relations' proposals to address Initiative 5 of the AALL Strategic Challenge to "strengthen relationships between AALL and its chapters." Additional proposals of the Ad Hoc Advisory Group have resulted in the Chapter Presidents' listserv, improvements to the chapter listings on AALL-NET, and a new publication, the Chapter Leadership Bulletin.

Thanks for the opportunity to attend the Annual Meeting!

PLL TECHNICAL SERVICES ROUNDTABLE

by Betty Roeske, Katten Muchin &
Zavis, Chicago, IL

COPING WITH VENDOR CHANGE was the topic of the Technical Services Roundtable. Chairperson Betty Roeske was the moderator for the panel of three publishers' representatives: Gene Landoe, Vice President Customer Service, CCH Inc.; Ken Halajian, Vice President for Professional Relations, Matthew Bender, and Donna Bergsgaard, Senior Publishing Advisor, West Group.

Two announcements were made before the vendors were given the floor. First, the listserv, Law-Tech, is being transferred to Washburn. Michael Cassidy will continue to be the moderator. When it is operational again, instructions will be posted on Law-Lib and PLL. Second, there is now a Web Page for the TS Roundtable: URL is aall.wuacc.edu/sis/pllis/ts.html. Please contact Betty Roeske at broeske@kmz.com if you have any comments, suggestions, etc., about the page.

Ken Halajian was the first speaker. He briefly told us how the decision was made to change to the present Bender binders. Numerous prototypes were considered and numerous test drops were done in order to guarantee the binders' contents would remain intact. The conversion to these new binders will continue for at least another six months.

He also discussed the format change for the Bender statements. There was a lengthy discussion about the ways the audience members use their statements. Numerous librarians with branch offices explained that the lack of title and shipping location has increased their workload. They need titles to verify that the branch has received an item.

Gene Landoe updated us on what changes have been made to CCH Customer Service. There has been an increase in staff. Book orders should be processed and shipped within 72 hours now. Statement information has been tightened. A Customer Service Improvement Program was begun this summer.

He also explained the 3 CCH representatives idea. It was decided that the representatives needed to be experts in the contents of their titles. It was pointed out to him that we do not need to know about new products as much as we need support for the existing ones. If we have trouble with statements, invoices or missing pages, we need someone to talk to that knows our accounts. Knowledge of the title contents does not help.

Donna Bergsgaard explained the numerous name changes for West Group. The shortened version of the name to West Group should be a permanent one. She added that WESTLAW is still separate.

Accounting personnel have been working long hours, since January, trying to clean up the data from the other companies. Our patience is appreciated as new staff is hired to decrease the backlog.

We hope the concerns and questions that the attending librarians raised will be addressed. At least, it was made clear to the representatives what works and what does not work for us

NETWORKING A/K/A SCHMOOZING IN BALTIMORE

by Virginia Smith,
Chaffe, McCall, Phillips, Toler &
Sarpy, LLP, New Orleans, LA

WHEW! LIFE'S A RUSH these days! Law firm libraries are always busiest in September and October; except, of course, when they're busiest in February and March; and then there's the rush of summer associates to contend with in June, July and August. Well, you get the picture, but I do want to tell you my theory about meetings.

When I was practicing law (a memory still too fresh in my mind for comfort), I made an effort to become involved in my local and state bar associations and found these experiences very rewarding. So, when I came to my senses and left the chaotic day to day practice of law for the controlled, and arguably more controllable, confines of the law library, I immediately joined NOALL (New Orleans Association of Law Librarians) and AALL and here I am four short years later, President of NOALL and the recipient of a travel grant from PLL to attend the annual meeting.

OK...now...my theory about meetings? Meetings are full of people; people have good ideas; I need good ideas; therefore, if I go to meetings, I'll meet people with good ideas, and I can gather those good ideas to use for myself. At the very least, I'll gather lots and lots of business cards with cryptic descriptions of the ramesake and her/his idea, specialty, on the back.

Then there are those encounters when you don't get a card or even a name...such as my "neighbor" in a particularly slow moving session, who told me about how she handled one of "her attorneys" who wanted every publication touted to him in a direct-mail brochure. She once sent him a memo outlining the total cost of the item he'd requested; initial cost, ongoing costs for three years, filing costs. She didn't get any more brochures from him with "Let's get this!" jauntily scrawled across the front for quite some time.

Schnoozing also helps me to keep my library and its problems in perspective. At one of the social functions, I found myself in conversation with a gentleman from a large law firm in a large city. We verbally sparred for a few minutes with those "Well, let me tell you what my administrator did..." tidbits until he beat me fair and square with a tale of such rigid adherence to procedure and senseless paper-pushing that I immediately fell to my knees (mentally, that is) and thanked whatever library gods there are that I work where I do and not there!

At every AALL meeting I attend I schmooze with some of the brightest, most innovative and dedicated people I know. We talk about "our libraries," but we also talk about our interests and our avocations, and I learn that this is a vital profession, and it's these people that make it that way. So, I go, I schmooze, I learn, and I return energized, armed with good ideas and ready to face this rush for another year.

PLL NEWS

MINUTES OF PLL BUSINESS MEETING JULY 20, 1997, BALTIMORE, MD.

by Jean O'Grady, Wilmer, Cutler & Pickering, Washington, D.C.
PLL/SIS Secretary

MICHAEL SAINT-ONGE called the meeting to order at 10:00 a.m. It was moved and seconded that we accept the minutes of the last business meeting as printed in *PLL Perspectives*.

Michael asked for a moment of silence in memory of colleagues who passed away this past year.

Michael introduced the officers, then welcomed all to the 19th official meeting of the PLL/SIS. He thanked Donna Tuke Heroy of Alert publications for underwriting the coffee and Joy Lindsay of The West Group for underwriting the lunch and sponsoring the luncheon speaker, Pat Wagner.

OFFICER'S REPORTS

Joan Jarosek, Treasurer, reported that the treasury is healthy.

Jean O'Grady, Secretary, reported on the election results and thanked the Nominations Committee. A motion to destroy the ballots was made, seconded and approved.

Outgoing Past Chair, Mary Smith Forman, reviewed the evolution of PLL since her first meeting and cited the AALL document on five practices of extraordinary leadership. She noted the dramatic shift from a posture of whining victimization to an empowered role where members lead by example. She made a powerful plea for volunteers.

Vice Chair, Anne Ellis reported that 105 new member kits were distributed this year and described the contents of the kit.

COMMITTEE/PROJECT REPORTS

Michael reported on the PLL Strategic Planning Committee meeting and indicated that its report was published in the Spring issue of *PLL Perspectives* and on the PLL website. In addition, Michael has established a Task Force on the Implementation of the Strategic Plan to assure continuity and to keep the plan on track. Martha Goldman will Chair the Task Force. Michael characterized the plan as a living document and outlined its six initiatives. He announced the time and location for the Town Meeting on the PLL Strategic Plan.

Following Michael's introduction of the subject of strategic partnerships with other organization, Anne Ellis described her attendance at the ALA meeting in Seattle where PLL used the

AALL traveling exhibit and sponsored a program called "Law Librarians: Making Information Work." She thanked Barbara Holt and local Seattle members for their support and urged everyone to reach out to local groups of lawyers and administrators and to offer to write and speak about the value of private law librarians.

Barbara Holt reported further on the Seattle ALA conference. Members of the local chapter, Law Libraries of Puget Sound, sent out 1400 postcards to registrants. At the booth they collected business cards for a contest in which 3 winners received the AALL Toolkit. Issues of *PLL Perspectives* and lists of local chapter presidents were distributed. She concluded by stating that this was a very positive experience for the chapter and for the volunteers.

Michael added that this year's program by PLL had been a vendor program and that he had appointed Joan Axelroth to a Committee to have PLL placed in a regular program slot at the 1998 ALA program in Boston. She was successful in getting a program on space planning accepted for next year's meeting.

Hazel Johnson, the official representative to the ABA Law Practice Management Section, identified three ways PLL members can get involved: 1) strategic partnerships, 2) assisting bar associations in providing consulting in law practice management, 3) contributing articles and books.

Michael thanked Holley Mohler for adding materials to the PLL Webpage.

Michael reported that Lexis/Nexis has given a grant of \$50,000 to develop eight resource guides on issues of concern to lawyers and administrators. The first is entitled "How Do You Hire a Law Librarian?" Michael is the editor.

Michael introduced Barbara Duval, for Diane Gates, Chair of the Mentoring Committee. Barbara reported that there were 14 participants this year. The committee has developed e-mail forms for the AALL website. She thanked the committee volunteers and described the benefits of mentoring. Michael described the recruitment letters that had been sent to 85 firm librarians who are members of AALL, but not PLL.

Anne Ellis announced the formation of the recruitment subcommittee of the Public Relations committee which will work closely with AALL Recruitment Chair, Karen Brunner.

Michael reported on *PLL Perspectives*, thanked Sabrina Pacifici and led a round of applause. Jan Brown has been appointed Editor and Gail Zwirner was appointed Co-Editor. Susanne Zumbro then introduced the newsletter advisory committee: Laurie Hart, John Davey, Kathie Sullivan and Joan Jarosek who will be committee chair.

Ralph Monaco, Chair of the Grants Committee, reported on

the guidelines, promotion and announcement of the grants. Eight grants were awarded.

Holly Mohler, who developed the PLL Web Page, reported for the Technology Committee on behalf of Anne Abate that all of the committee's business was conducted electronically. They have generated ideas on technology programs which have been submitted to the education committee. The PLL official Listserv was inaugurated this year.

Kathie Sullivan reported as chair of the Consumer Advocacy Committee. Its goal is to create one voice and to empower us to understand what is happening in our budgets. CAPLL will work with Ken Svengalis and Margie Axtmann but will not overlap the work of CRIV. CAPLL will conduct polls and request responses.

Aimee Ruzicka reported for the Education Committee that 7 out of 8 programs submitted had been chosen for the 1997 AALL program. She read the program titles and thanked the coordinators.

Tom Duggan, Program Committee Chair for the 1998 Anaheim convention, reviewed the programming process and asked for assistance.

GROUP REPORTS

Aimee Ruzicka reported for the Corporate Group that the directory will be updated and mailed out.

Dottie McCaughtry reported for the Independents Group that they will update their committee information and add it to the PLL web page. Joni Cassidy will be committee chair.

Carol Bannen reported that the Intellectual Property Group plans to publish a directory and establish a listserv.

Jeanne Reynolds reported that the Records Management Group has proposed a workshop for the Anaheim Annual Meeting and that they plan to develop a toolkit and target ALA.

Betty Roeske reported that the Technical Services Group is switching listserv providers.

Michael announced that PLL member Marie Wallace will receive the Marion Gould Gallagher lifetime service award. He then displayed the neon green PLL Leader Ribbon which was distributed to the PLL Executive Board and Committee Chairs. He invited everyone to ask people wearing those ribbons how to get involved.

There was no new business.

Michael introduced the new officers: Glen Gustafson, Vice Chair/Chair Elect; Claire Engle, Treasurer; Lori Weiss, Board Member and thanked the membership for their support of PLL.

Incoming Chair Anne Ellis thanked outgoing Chair, Michael Saint-Onge, and gave him a gift. She also thanked Sabrina Pacifici, former Editor of *PLL Perspectives*, and announced that she will also receive a gift from PLL. She asked for a round of applause for Sabrina. She then thanked outgoing Treasurer Joan Jarosek and Past Chair Mary Smith Forman. She acknowledged Mary's contribution to the PLL Strategic Plan. She noted that she will be changing jobs when she returns to Denver.

Anne invited everyone to attend the PLL luncheon where speaker, Pat Wagner, will talk on "Marketing as if Your Job Depended on It."

PLL 1996-1997 EXECUTIVE COMMITTEE MEETING BALTIMORE, JULY 19TH, 1997

by Jean O'Grady, Wilmer, Cutler & Pickering, Washington D.C.

THE 1996-1997 PLL EXECUTIVE COMMITTEE MEETING was called to order at 5pm by Michael Saint-Onge. Those in attendance were Michael Saint-Onge, Karl Gruben, Jean O'Grady, Anne Ellis, Glenn Gustafson, Claire Engle, Lori Weiss and Mary Smith Forman.

Jean Jarosek read the Treasurer's report, and there was a brief discussion of ways to reduce the cost of mailings of ballots.

OLD BUSINESS

Anne Ellis reviewed committee activities:

Kathie Sullivan has been appointed Chair of the **Consumer Advocacy Committee**. She noted that two programs submitted for the ALA convention in Boston in 1998 have been accepted. They are Space Planning, presented by Joan Axelroth, and Electronic Libraries.

Education Committee: 7 of 8 proposals submitted were accepted for the Baltimore meeting.

Grants Committee: Approved 8 of 13 grant requests

Nominations Committee: Slate of candidates was recognized.

Joan Jarosek will host a PLL Appreciation Reception at Jones Day to enhance relationships and thank incoming and outgoing **Executive Committee** members and chairs of PLL committees.

The Strategic Partnership with the Law Practice Management section of the ABA was reviewed.

NEW BUSINESS

Michael Saint-Onge announced that a Town Hall meeting will follow the luncheon. He also announced that Lexis has donated money for the publication of resource guides to be aimed at managing partners. Titles include "How to Hire a Law Librarian."

Mary Smith Forman made a proposal regarding the attendance of a PLL Executive Board member at the Association of Legal Administrator's Convention. In the past, the Past Chair has attended but Mary suggested that the incoming chair attend. That person would be able to carry through for two years. Joan Jarosek seconded the motion which was passed unanimously by the committee. The Procedures Manual will be amended to reflect this change.

Michael Saint-Onge adjourned the meeting at 6 p.m.

TREASURER'S REPORT

Beginning Balance 10/1/96	\$33,433.14
Income through 5/97	3,950.00
Expenses through 5/97	-23,691.27
Balance 5/01/97	13,691.87

*The most recent figures available from Headquarters are May 31 numbers.

Note: The bulk of our income, membership dues, will not be credited to our Treasury until late summer.

PLL 1997-1998 EXECUTIVE COMMITTEE MEETING BALTIMORE, JULY 20TH, 1997

by Jean O'Grady, Wilmer, Cutler &
Pickering, Washington, D.C.

ANNE ELLIS, PLL CHAIR called the meeting to order at 5:00 p.m. Those attending were Michael Saint-Onge, Karl Gruben, Jean O'Grady, Anne Ellis, Glenn Gustafson, Claire Engle, Lori Weiss, Gail Zwirner, Jan Brown and Joan Jarosek.

OLD BUSINESS

The Grants Committee will modify its program. After coming up with a list of recipients, it will make awards based on need and hand them out until the \$2,500 allocated is awarded.

NEW BUSINESS

Newsletter Advisory Committee-Chair Joan Jarosek reported that the Committee had met in Baltimore and discussed advertising rates. Joan will assign liaisons from the Committee to the various Committee Chairs. *PLL Perspectives* deadlines will be put up on the PLL web page. The idea of making *PLL Perspectives* an elec-

tronic publication was discussed. Status of the Editor and co-editor as ex-officio members of the Newsletter Advisory Committee was discussed and approved.

Anne Abate will be the liaison to Special Libraries Association. Ways to promote AALL in Anaheim to local SLA chapters in California were discussed. This task will be assigned to the Public Relations Committee. There will be an initiative to establish links with SLA for important projects such as the salary survey and consumer advocacy.

PLL will seek to promote participation by members in the AALL Salary Survey.

Anaheim—Michael Saint-Onge suggested changes in the PLL event schedules as there will be keynote speakers every day including Sunday.

Strategic Plan—Martha Goldman will chair the Task Force on the Implementation of the PLL Strategic Plan.

The 1997-98 Budget was discussed and the Executive Board agreed to raise the amount allocated for attendance at PLL related meetings to \$2,000. The cost of the election was discussed, and it was suggested that Secretary, Jean O'Grady, draft new procedures to simplify the balloting process in order to reduce costs.

Lori Weiss moved to approve the Budget and Karl Gruben seconded. The Executive Committee approved the budget unanimously and it was passed as amended.

Anne Ellis adjourned the Meeting at 6:30 PM.

RECORDS MANAGMENT GROUP REPORT

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

I AM PLEASED TO ANNOUNCE that our workshop for Anaheim has been approved for Saturday, July 11. It is entitled "The Challenge of Records Management: New Horizons for Law Librarians." and has been planned to include topics of interest to librarians with varying levels of experience. It has been designed to allow attendance for either the full day, beginning with the basic principles of legal records management, or half day with the afternoon focusing on more advanced topics such as the CRM examination and discussion of how significant events such as lawsuits, adding new offices, etc can impact the records center.

Watch for more details in upcoming issues of *PLL Perspectives*. In the meantime, if you have any questions or comments, please contact me or my co-chair for the workshop, Claire Engel:

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