“A must for academic and law-school libraries.
... A treasure trove of information for those who teach
or practice church-state law.” —Voice of Reason

RELGIOUS LIBERTY
Douglas Laycock

“Any person who cares about religious liberty in America (and we should all be greatly concerned about its increasingly fragile condition) needs to read Douglas Laycock.”

—Kim Colby, Center for Law and Religious Freedom

Each individual volume and complete five-volume set
AVAILABLE NOVEMBER 2018

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Wherever books are sold.
Are leaders born or made? It’s probably a little of both, but recent research in the corporate realm indicates that we are doing a very bad job of developing employees into leaders. The findings, and what to do about them, are described in a November/December 2017 Harvard Business Review article titled, “Turning Potential into Success: The Missing Link in Leadership Development.” The article, written by three leaders with the global executive search firm Egon Zehnder, shares insights from the firm’s research on internal corporate leadership development programs designed to identify and grow talent from within.

The article also cites recent research by the Corporate Executive Board Company (CEB) indicating that while approximately 66 percent of companies have such programs, only 24 percent of company leaders view the programs as successful. Furthermore, 87 percent do not have confidence in their up-and-coming leaders. Additional research conducted by Egon Zehnder indicates that while there is plenty of untapped talent, the problem lies within the leadership development programs themselves. The institutional cost of this failure is high, as employees are less engaged and more likely to move on to other organizations. According to a Gallup poll, 55 percent of corporate managers are actively looking for another position.

Library leaders can learn a great deal about growing leadership potential from the corporate experience. Egon Zehnder recommends a four-step process that begins with assessing the greatest needs of the company, determining which leadership attributes are most likely to lead to success, and identifying which positions require those skills. Examples of the most commonly identified competencies are strategic thinking, collaboration, change management, and inclusiveness.

After determining the organization’s needs, the next step is to evaluate employees’ qualities and probabilities of success as leaders. Egon Zehnder identifies five predictors of success: motivation, curiosity, insight, engagement, and determination. Individual employee strengths can then be compared to the attributes needed for particular roles within the organization. Finally, employees can receive individualized training and development in the identified areas.

The article also includes graphics and rubrics that are helpful in assessing competencies, matching skills to job roles, and comparing candidates.

Another interesting finding from the Egon Zehnder research is what successful leadership development actually looks like. The two most impactful activities, according to the survey, are moving potential leaders through a variety of positions and assigning them projects that require skills slightly more developed than they currently possess. For many of our institutions, these activities also have the potential to be quite disruptive to workflows. Learning a new position or using a skill such as project management for the first time will often come with some bumps in the road.

Institutions will need to commit to some possible costs in efficiency and skill to reap the reward of growing talent, as well as increasing efficiency and skill from within the institution. How can you implement a similar leadership development program in your own library?

Kristina L. Niedringhaus
krisn@gsu.edu
CHANGING DATA, EVOLVING LIBRARIANS

Reimagining the role of law librarians and legal information professionals in today’s business-focused world.

BY ZENA APPLEBAUM

LEARNING FROM CRUCIBLE MOMENTS TO BECOME BETTER CRISIS LEADERS

Tips for leaders on acquiring the traits and building the skills needed to succeed in crisis leadership.

BY STEVEN J. BELL

STRATEGIC PLANNING: USING SWOT OR SOAR ANALYSIS TO IMPROVE YOUR ORGANIZATION

Why SOAR’s Appreciative Inquiry theory may make it a better fit for law libraries.

BY MICHELLE COSBY

BoK DOMAINS KEY

- Teaching + Training
- Marketing + Outreach
- Management + Business Acumen

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COMING SOON
AALL INNOVATION BOOTCAMP
APRIL 2019 / CHICAGO

stay tuned at bit.ly/AALL-innovation
Of course, this change comes with new colleagues, culture, challenges, and possibilities. As my emotions have swung from sadness in leaving behind friendships to excitement in embarking on a new chapter in my life, I have come to realize that my perspective on and attitude toward change will determine whether I thrive or barely survive.

Change provides unparalleled opportunities to reimagine approaches and bring in fresh perspectives while fine-tuning proven cultural and institutional legacies. For the most part, law libraries continue to elicit and engender a healthy respect and appreciation from users, and this month’s issue of *AALL Spectrum* showcases opportunities for law librarians and legal informational professionals to flourish in a constantly evolving and rapidly changing landscape. The feature article focuses on changing data and the evolving librarian, and it encourages librarians to capitalize on their skills and expertise in data curation and analysis to bring structure to—and produce competitive intelligence from—the constant deluge of data, which in turn will deliver tremendous business benefits to their stakeholders.

Deploying effective change management rests on your ability to develop and powerfully convey a clear strategic vision. How are you planning to be successful in times of change and disruption?

In this issue, you can read about the benefits of utilizing a SOAR (strengths, opportunities, aspirations, and results) or SWOT (strengths, weaknesses, opportunities, and threats) analysis approach to strategic planning. And for those times when even your best laid-out plans do not necessarily prepare you for the unexpected, and you suddenly find yourself faced with the unnerving prospect of shepherding your organization through a time of crisis, the feature article on learning how to become effective crisis leaders provides useful tips for succeeding in crisis leadership. Finally, the heartwarming narrative of law librarians from the University at Buffalo Law Library exemplifies what successful crisis leadership looks like. Taking action, law librarians collaborated with a law school clinic, journeying to Puerto Rico in the throes of a natural disaster to set up a mobile legal research clinic and provide humanitarian assistance to citizens.

As we close out the year and experience another change in seasons, I wish you a successful transition in whatever your season of change may currently look like.
We are **Stronger**, **Smarter**, and **More Successful** Together

**SAVE THE DATE**
**JULY 13-16, 2019**

www.aallnet.org/conference
TRENDING LAW FIRM CI

As technology continues to evolve, so too does the law firm library. To assess the current landscape, ALM Legal Intelligence conducted its 17th annual Survey of Law Firm Knowledge Management, Library, and Research Professionals. Survey results show that law firm librarians are primarily focused on bringing competitive intelligence functions to their roles within their organizations. AALL Executive Board member Jean P. O’Grady discussed the survey findings in a recent Dewey B Strategic blog post and shares a few highlights below.

DEPARTMENT FUNCTIONS, RESPONSIBILITIES, AND TOOLS

Which of the following would you describe as formal duties and responsibilities of your department?*

<table>
<thead>
<tr>
<th>Department</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practice of Law Research</td>
<td>98%</td>
</tr>
<tr>
<td>Research Publications &amp; Subscriptions</td>
<td>96%</td>
</tr>
<tr>
<td>Procurement Rights Management</td>
<td>91%</td>
</tr>
<tr>
<td>Business of Law Research</td>
<td>80%</td>
</tr>
<tr>
<td>Attorney Research Education</td>
<td>54%</td>
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<tr>
<td>Knowledge Management</td>
<td>52%</td>
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<tr>
<td>Data Analytics</td>
<td>52%</td>
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<tr>
<td>Conflicts Research</td>
<td>30%</td>
</tr>
<tr>
<td>Project Management</td>
<td>22%</td>
</tr>
<tr>
<td>Process Improvement</td>
<td>22%</td>
</tr>
<tr>
<td>Practice Management</td>
<td>11%</td>
</tr>
<tr>
<td>Docket/Calendar</td>
<td>11%</td>
</tr>
<tr>
<td>Records Management</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>20%</td>
</tr>
</tbody>
</table>

*Multiple responses were allowed.

Survey findings based off the 2018 Survey of Law Firm Knowledge Management, Library, and Research Professionals and the ALM Intelligence Library Survey presentation.

KEY FINDINGS

- About 65 percent of firms said their budgets had increased—29 percent reported increases of 3 to 5 percent.
- The volume of both the business of law research and the practice of law research has been increasing.
- 29 percent of the respondents are engaged in developing in-house tools for AI and analytics.
- 47 percent have staff involved in programming.
- 29 percent are involved in custom development of tools using AI and analytics.
- 87 percent work closely with IT in setting priorities and strategies.
- The sole CALR (computer-assisted legal research) provider trend appears to have faded away. No firms reported having selected a sole CALR provider. All firms had Lexis, Westlaw, and Bloomberg—although there was no indication if firms were referring to Bloomberg Law or the Bloomberg BNA products.

Content provided by Jean P. O’Grady, Director of Research & Knowledge Services at DLA Piper, Robert Alston (ALM Intelligence Senior Director of Sales, Legal Intelligence) and Miriam Rozen’s article “Law Librarians Focusing More on Competitive Intelligence, Survey Shows,” published July 6, 2018, in The American Lawyer.

View Jean’s blog post at bit.ly/ND18DeweyB.
What book or resource do you turn to for advice on growing your career or leadership skills?

1. **MESSY: THE POWER OF DISORDER TO TRANSFORM OUR LIVES** by Tim Harford (Riverhead Books, reprint edition, October 3, 2017). “It is easy to become frustrated with the constant change and disruptions that occur in our professional lives. This book taught me to embrace these disruptions because they actually can lead to creativity and better thought processes. Harford does an excellent job of providing examples in a variety of contexts to demonstrate how messiness can benefit leaders. Not every meeting, project, or workday needs to be organized and tidy. We need to realize that interruptions and chaos can force us out of our comfort zones and bring better results. Instead of becoming discouraged and stressed out, accept the messiness knowing that being flexible and resilient will make you a better leader.”

   Thomas J. Striepe; Associate Director for Research Services; University of Georgia; Alexander Campbell King Law Library; Atlanta, GA

2. **THANKS FOR THE FEEDBACK: THE SCIENCE AND ART OF RECEIVING FEEDBACK WELL** by Douglas Stone and Sheila Heen (Viking, 1 edition, March 4, 2014). “Feedback is everything and is often an important part of figuring out how to advance your career. Am I doing things right? How can I improve to get that other job/promotion? How do I become a leader (because you need to be able to both receive and give feedback as a leader)? This book breaks down why getting feedback can be so hard, how our brain processes feedback, and it offers practical tips for becoming better at receiving and giving feedback using examples from a wide range of personal and professional scenarios. The lessons are widely applicable and the book is incredibly useful.”

   Taryn Marks; Faculty Services Librarian and Professor of Legal Research; University of Florida, Levin College of Law Legal Information Center; Gainesville, FL

3. **CREATIVE CONFIDENCE: UNLEASHING THE CREATIVE POTENTIAL WITHIN US ALL** by Tom Kelley and David Kelley (Currency, 1 edition, October 15, 2013). “This book is a must-have for those looking to develop leadership skills. Creative confidence, as defined in this book, is ‘a way of experiencing the world that generates new approaches and solutions.’ I think this is the best mindset for thinking about leadership. While the discussions about human-centric design-driven innovation and gaining empathy in a business context are valuable, this book is essential because of its major takeaway—you don’t have to be a professional artist to be creative, you can just be a more creative lawyer, librarian, or leader who embraces an innovative culture and encourages the creative spark in those around you.”

   Nicole P. Dyszlewski; Research/Access Services Librarian; Roger Williams University School of Law Library; Bristol, RI

4. **QUIET: THE POWER OF INTROVERTS IN A WORLD THAT CAN’T STOP TALKING** by Susan Cain (Broadway Books, January 29, 2013). “I never minded being referred to as an introvert, but it wasn’t until I read this book that I understood how valuable traits typical of introverts could be to developing my career. Quiet helped me understand how I work as an introvert and how to work better with those who are not. It has made me more confident to play to my strengths, rather than feel as if I have to go outside of my comfort zone to be successful. No matter where you fall on the introvert/extrovert scale, this book will help you learn how to understand and work better with your colleagues.”

   Theresa K. Tarves; Associate Director; Professor of Legal Research; Montague Law Library; Penn State Law; University Park, PA
AALL Appoints New Executive Director

Following a thorough and thoughtful search, the AALL Executive Board selected Oolagamani (Vani) Ungapen as AALL’s new Executive Director. Her official start date was October 15. In her role, she will provide oversight for AALL’s day-to-day activities, and is responsible for the management of AALL Headquarters and staff. She will work closely with the Executive Board in formulating policies and setting the strategic direction for the Association, as well as helping implement the policies set by the board. Vani brings to the executive director role more than 14 years of experience in management positions with other professional trade associations. Most recently, Vani served as manager of global education and membership for the National Association of Realtors. Prior to that, she served as director of global business and legislative research with Florida Realtors.

In these positions, Vani was tasked with leading each organization’s approach to continuing education and certification programming, creating educational programming, and serving as a liaison on public policy between the association and members of the legislature. Her varied responsibilities and cumulative experience in association management made Vani an ideal choice as our new executive director.

For more on Vani, read the press release at bit.ly/AALLED0927.

AALL Day on the Hill

ADVOCACY LEADERSHIP
TRAINING & LOBBY DAY
Friday, July 12, 2019
8:30 a.m. to 5:00 p.m. (EDT)
Washington, DC

As a law librarian, you are in a powerful position to influence your elected representatives on the issues that affect the profession. By attending AALL’s Day on the Hill, you’ll learn about the essential information policy issues on AALL’s agenda and how to successfully advocate for law libraries, and then meet with your members of Congress and their staffs to champion our priorities. There is no registration fee for AALL members. Registration will open in early 2019.

For more information, visit bit.ly/AALL19LobbyDay.

2018-2019 CALENDAR

NOVEMBER 2018

01 AALL Executive Board election results announced
01-03 AALL Fall Finance & Budget Committee Meeting
21-23 Southeastern Chapter of the American Association of Law Libraries Annual Meeting
28-30 AALL Management Institute

MARCH 2019

08-09 AALL Winter Finance and Budget Committee Meeting
11 AALL Executive Board Summer Meeting
13-16 112th AALL Annual Meeting & Conference, Washington, DC

QUICK LINKS

AALL ANNUAL MEETING bit.ly/AALL2019
AALL EDUCATION bit.ly/AALLeducation
MEMBER PROFILE

VANTAGE POINT

ERIC YAP
- REFERENCE LIBRARIAN
- ADJUNCT PROFESSOR
- BROOKLYN LAW SCHOOL LIBRARY
- BROOKLYN, NY

WORDS TO LIVE BY?
"The struggle of man against power is the struggle of memory against forgetting."
Milan Kundera, The Book of Laughter and Forgetting

WHAT INSPIRES YOU MOST?
I am inspired by stories of ordinary people whose optimism and can-do attitude allow them to prevail over significant obstacles in their lives. The success stories of immigrants in the United States, as well as in other countries, resonate deeply with me.

A SKILL YOU’D LIKE TO LEARN?
How to put together anything from IKEA!

IF YOU COULD HAVE ANY SUPERPOWER, WHAT WOULD IT BE AND WHY?
I’d like to be omnilingual, so I could read works of literature in their original languages and have meaningful conversations no matter where I travel.

IF YOU COULD LIVE IN A BOOK OR MOVIE, WHAT WOULD IT BE?
I wouldn’t mind stepping into the shoes of any number of the dramatis personae of the Japanese movie Tampopo. It’s a cinematic world populated by food-obsessed characters, and I would love to join in their quest for the perfect ramen.
FAVORITE APPS/TECH TOOLS

4 CLICKS

The apps help us easily screenshot and annotate content from web pages, create and edit animated GIFs, and highlight, clip, and organize text from websites. Plus, a tiny computer helps users learn programming and create apps. What apps/tech tools are essential to your workday?

**MONOSNAP**
“Monosnap is a free screenshot tool I use almost daily, whether it’s to capture images of the library catalog to visually explain how to request an item, to highlight how to access library databases from off campus, or to send a help request with corresponding error messages to the Information Technology department or a vendor. Monosnap not only gives you the ability to control what part of the screen you want to capture, it has built-in annotation tools so you can highlight and add text and shapes to the screenshot within the same program. Bonus feature: video screen-casting is also easy with Monosnap—you can record with or without sound.”

Mari Cheney; Assistant Director, Research and Instruction; Lewis & Clark Law School; Billey Law Library; Portland, OR

https://monosnap.com
(Windows, MacOS X; free)

**SCREENTOGIF**
“Quite a few applications will help you create animated GIFs [try GIPHY Capture if you’re on a Mac, but I like ScreenToGif because it is free, lightweight, and open source. I use ScreenToGif whenever I need to explain something I’m doing on a screen, whether that’s a path I’m following on a website or where to find a particular option in an application’s menu— anytime I want to convey more information than an ordinary screen capture will allow. The resulting GIF can be used in a LibGuide, PowerPoint, or Google Slides presentation, or even as an attachment to an email. ScreenToGif also provides editing tools so you can add text captions, shapes, or a progress bar.”

Rebecca Fordon; Faculty Services Librarian; UCLA School of Law; Hugh & Hazel Darling Law Library; Los Angeles, CA

ScreenToGif.com
(Windows; free)

**POWERNOTES**
“PowerNotes is a subscription-based Chrome extension that lets you clip text online, keep the URL for the clip, annotate it, and organize it into an outline. When you are finished, you can rearrange clips and export to Word or RIS (citation management software) to write your paper. For me, it breaks down the barriers between siloed databases I can research in Westlaw, Lexis, Bloomberg, and other databases, while keeping all my notes in one place. Simply install the PowerNotes Chrome extension, then use it to highlight and capture text on most web pages; select the citation option to grab a citation with the clip. Create a project to store your research on a specific subject and customize topics to organize a project. Once you’ve added content, click on Project Outline to see all clips and rearrange or delete. Once you’re finished, simply export the clips to a Word document to create your outline.”

Cynthia W. Bassett; Electronic Services Librarian; University of Missouri Law School; Columbia, MO
https://powernotes.com
(Windows, Mac; negotiated by subscription)

**RASPBERRY PI**
“Raspberry Pi is a low-cost ($35) microcomputer with onboard wireless and Bluetooth connectivity that can be used to learn programming. These microcomputers are simple to set up and maintain. You can buy extra microSD cards and easily image your entire system for a quick and easy backup should there be a failure with the main system memory card. Raspberry Pis also take a fraction of the power to run compared to a typical desktop computer. At approximately $80 for a complete kit, the Raspberry Pi ZERO W is an excellent solution for in-house digital signage display. There is robust online community support for the platform and many other possible projects that Raspberry Pi can be used for, depending on the projects’ computing needs. I would encourage anyone wanting to save money on their computer budget to check out these wonderful microcomputers.”

Iain Barksdale; Associate Director of Information Services; Bounds Law Library; The University of Alabama School of Law; Tuscaloosa, AL
https://www.raspberrypi.org
($80 for the complete kit)

**TELL AALL SPECTRUM**
What apps are essential to your workday? Email hhaemker@aall.org and your answer may be featured here.
CHANGING DATA, EVOLVING LIBRARIANS

Reimagining the role of law librarians and legal information professionals in today’s business-focused world.

BY ZENA APPLEBAUM
For many years, I have advocated for law librarians to be actively engaged in firm initiatives in competitive intelligence, knowledge management, business development research, and other areas of law firm administration that are increasingly becoming important to a firm’s ability to compete. As competition in the legal world increases, firms are hiring fewer administrative professionals. The ones who are hired are expected to do more with less, take on additional responsibilities, and execute on more sophisticated projects. This necessitates not only a broadening of skill sets, but also a reimagining of roles and titles. To me, this is where librarians, especially more recent graduates with digital skills—but really any librarian with organizational, business-minded skill sets—can really add value to their law firm.
The deluge of available information is not decreasing; it is only increasing at a crazier rate each year. The amount of unstructured data, let alone the structured content that is streaming through firms at any given moment, is overwhelming. Cue the law librarians and legal information professionals to help us make sense of the data, turn information into intelligence, and still deliver research while managing collection costs and physical spaces.

Following my experience at the Canadian Association of Law Libraries (CALL) 2018 annual conference, I wrote a post for 3 Geeks and a Law Blog about the importance of law librarians and their ability to bring a broader—or I would argue, a more business-minded—focus to their skill set. The post, “Bored Walk and Profit Place,” was a riff on the board game Monopoly—which is a game of strategy and skill as much as chance. (View the blog post at bit.ly/ND18Applebaum.)

Below is an excerpt on the topic from the blog post:

“As the legal market for the buy side and the sell side is changing, so too is the market for law librarianship. As we encourage firms to think about their business as a business within a business, we must also encourage law librarians to acknowledge that the comfort zone has changed. It is wide and it is deep, and the 2018 Canadian Association of Law Libraries conference barely scratched the surface. The law library, much like the information technology (IT) or accounting department, is a necessary part of the business. No one asks the IT department to recoup the cost of the MS Office Suite that is used in drafting legal documents, nor would we ever suggest a firm function without that software. Similarly, research and practice tools are necessary parts of the business. We need to stop lamenting that the recouping of library costs is being decreased year over year from 80 percent in the 90s to less than 40 percent in some cases today. That model is broken; it is dead. Would a firm ever consider practicing without research tools or word processing software? That’s table stakes and the effectiveness or value of the library should not be measured by the percent of costs recouped. As the eloquent Judy Harvie of Norton Rose Fulbright said in the same SWOT-ing (Strengths, Weaknesses, Opportunities, and Threats) session, (I am paraphrasing here), “It’s time to leave the past behind us and move forward.”

Librarian Skills Sets and the Law Firm

So, what does this actually look like inside a firm? What are some examples of how librarian skills can be amped up and reach deeper into firms? Let’s look at how data has evolved and created new opportunities for law librarians in the digital age, allowing them to leave the past ways of analyzing and curating data behind and move forward in a new, but analogous, direction.

Imagine that you had one place where all communications and touch points from research done in support of a client file—from billings to continuing legal education to client event invites, as well as external information (client press, 10K, Twitter feeds, etc.)—resided in one place. Law firms, by nature, categorize and track more information than companies in many other industries. The library is a perfect neutral home in which such a client database should reside in the new world. A good dot connector, such as a law librarian, trained in legal research and logical dot connection, can leverage this to his/her advantage.

It’s not just about connecting different cases, citations, or secondary sources, it’s also about telling the story of the firm’s internal data, as it is combined with external research. The dot connectors would need the keen eyes of a curator, a cataloger, and an analyst. Not to mention the collection would need to be culled and simultaneously grown over time. Any initiative or change in behavior would require a significant investment in training and development—another strong skill set of existing librarians.

Now, imagine if all of the administrative groups, including the library, could not only access the database, but also be trained to appreciate the importance of it as it relates to the business
of the firm, and then encouraged and empowered to comment on the information in the system on an ongoing basis. How much better would your firm be at supporting and even anticipating those clients’ needs—from legal research to policy changes, to internal events of interest? And while it may be a burden for law librarians to retrain themselves and their processes to think this way, because of curated and analyzed data, the end result is happy clients.

We all know that happy clients are the mainstay of law firms. The role of the law librarian could be utilized to make connections with the other administrative departments to engage collaboration and dot-connecting for competitive advantage. In some cases, the solution may be to connect the various software programs housing the data from accounting, marketing, and through running reports, and including this data as a standard input in data intelligence reports. In other cases, the solution may lie in educational and outreach programs to other departments to feed a data program with relevant data sets and information through a hotline or email box. Depending on a firm’s appetite and budget, a law library, in conjunction with other groups, could look into buying third-party software, such as AWDC’s FirstLight, ComIntelli’s Intelligence2Day, or Manzama’s platform, to capture most of the data and match it with external research (as this would be outside of the usual and typical comfort zone of the library, it would allow law librarians to create fulsome and robust opportunities for their firm from within their neutral and respected library).

**Law Librarians and the Future**

Data, as outlined above, is just one of the many places that law librarians can create and provide added value for their firms. There are of course knowledge management channels, as well as a whole host of other avenues, including competitive intelligence, request for proposal support, and UX design. In fact, I am sure my own age and experience limit my perspective in terms of all of the opportunities that exist for law librarians in firms. I will say that as much as the future looks bright and shiny, to get there means we have to leave the safety, security, and coziness of “the thing we have always done.” Law firms are leaving profit on the table. I do believe this, and I further believe that law librarians as well as others are already and will continue to play a significant role in the exploitation of that opportunity. Firm culture will dictate what change initiatives work and what change initiatives fail, but departmental insights and attitudes will tip the scales. Let’s make sure that when it comes to law librarianship, we are amongst those driving the change and making this happen, so that we turn the bored walk into the profit place.

**Research + Analysis**

**Information Management**

**Zena Applebaum** is the Director of Professional Firm & Corporate Segments with Thomson Reuters in Canada. In her role, Applebaum is responsible for client feedback and intelligence, market insights, and sales enablement. Prior to joining Thomson Reuters, she was the Director of Competitive Intelligence at Bennett Jones LLP, having pioneered the discipline of law firm CI, and authoring *Business Intelligence for Law Firms*, published in November 2012. Applebaum shares her passion for the industry as a speaker, writer, and contributor to blogs (including *3 Geeks and a Law Blog*) with topics ranging from competitive intelligence, legal industry change management, qualitative data analysis, and personal branding. A data junkie who revels in the possibilities of data to connect people, places, and things, she can often be found connecting the dots between seemingly unrelated data. In 2015 she was inducted as a Fellow of the Council of CI Fellows. Applebaum is also a sessional instructor at the University of Toronto iSchool, and currently serves on the SLA Board of Directors. Applebaum can be reached at @ZAppleCI.

**READ**

Zena Applebaum’s article “Competitive Intelligence and Your Library: 10 Best Practices for Starting (Or Growing) a CI Function for Small and Medium Firms,” in the September/October 2016 issue of *AALL Spectrum* at bit.ly/SO16CI.
LEARNING FROM CRUCIBLE MOMENTS TO BECOME BETTER CRISIS LEADERS

Tips for leaders on acquiring the traits and building the skills needed to succeed in crisis leadership.

BY STEVEN J. BELL

If you lead, you will face a crisis. Of all the demands made on leaders, crisis leadership is probably the most challenging, and it is the one they are least prepared to handle properly due to lack of experience and skills. While thinking ahead about how to respond in a crisis can help, it really comes down to whether each leader’s personal experience has equipped them with the right level of fortitude and courage to take an organization through such an event, especially given the highly unpredictable nature of crises. The central premise presented in this article is that each leader can gain valuable experience and learn from his or her own crucible moments, and that this will in turn help them become more confident crisis leaders.
When leaders have crucible moments, no matter how things turn out, they learn from those experiences. The ideas and strategies introduced here are meant to assist you with the acquisition of crisis leadership skills, skills that will even help prepare you for the more contemporary “dark times” crises that we are experiencing in the digital age.

When leaders have crucible moments, no matter how things turn out, they learn from those experiences. The ideas and strategies introduced here are meant to assist you with the acquisition of crisis leadership skills, skills that will even help prepare you for the more contemporary “dark times” crises that we are experiencing in the digital age.
Keep Calm and Assess: Leaders need to reassure staff and their superiors that they are in charge and have a clear understanding of the nature of the crisis. Not only do they need good information gathering, using a variety of sources, such as assembling staff who may have more information and unique insights, but they also need to be able to interpret the information in order to assess what’s happening—this is also the first step in deciding how to act or respond.

Act Quickly, but Not Too Quickly: Leaders need to take action—that means making decisions about how to react to the situation. In the Cuban missile crisis, President John F. Kennedy was pushed by some of his more hawkish advisers to take military action. Rather than reacting quickly, he slowed things down a bit to consider multiple responses. Slowing down also allowed him to obtain more information and reassess the situation. To bolster your staff’s confidence in you as a leader, slow down a bit to avoid coming across as nervous or confused.

Establish Lines of Communication: Routine, clear communication is a core quality of effective leadership. Established lines of communication with staff are even more critical in a crisis where transparent leaders can make a difference. Effective leaders will put multiple, reliable channels of communication into place well ahead of a crisis. Whatever mediums are used, be it a blog, podcast, or texting network, they establish the lines of communication. Gain transparency by acknowledging the situation.

Manage Expectations Realistically: Even when a leader communicates what they know about the situation, or as much information as the leader feels they can comfortably share, it’s best to anticipate that some staff will still express dismay and alarm. After determining the magnitude of the crisis situation, leaders can provide a realistic expectation of likely next steps on the road to recovery, as well as a timeframe for a return to normalcy.

Demonstrate Control: In non-crisis leadership, the ability to relinquish control and allow subordinates to have autonomy contributes to a healthy organization. In a crisis situation, staff want to know that their leader is in control. Leaders need to bring stability by taking action, assigning tasks, and committing resources to damage control. Leaders should strive for a decisiveness that communicates they are in control and working to resolve the crisis.

Be Flexible: During a crisis, leaders must quickly adapt their strategies as events unfold. The crisis response that appeared appropriate at first may prove inadequate or totally wrong as the situation changes or new information comes to light. Leaders need to acknowledge they won’t have all the answers. Flexible crisis leaders consult with subordinates and allow them to contribute to the crisis response. A leader should set the direction, but enlisting others to get through a crisis allows for greater flexibility.

Leading Through a Dark Times Crisis

There is a new type of crisis that leaders must deal with. Typically external to the organization—for example, global terror attacks, mass shootings, senseless violence, or catastrophic disasters—these shocking and unexpected crises lead to damage in ways that are less visible to leaders. In the Harvard Business Review article “Being a Good Boss in Dark Times” (view the article at bit.ly/ND18HBRdark), author Jennifer Porter refers to these as “dark times” crises. These events contribute to heightened levels of stress, volatility, and uncertainty among workers. The result is new workplace challenges for which leaders are less prepared to respond. Many leaders struggle with this personally. Finding the right words or appropriate response is hard.

How can leaders best respond in a dark times crisis? During his two terms in office, President Barack Obama repeatedly demonstrated what great leaders do in times of crisis.
reassurance that our world was far from spiraling out of control and that we would weather each crisis, working together to find the way to better times.

In the same article, Jennifer Porter offers recommendations for responding to a dark times crisis, which are summarized below:

- **Acknowledge Your Own Emotions:**
  Leaders who are able to share their personal feelings of shock, sadness, or numbness during a dark times crisis will help colleagues address their own feelings. Past advice was to keep emotions out of the workplace. Contemporary leaders need to understand it is acceptable to acknowledge one’s own emotions during these difficult times.

- **Speak from the Heart:**
  Accept that your words or actions will likely cause some discomfort, and that whatever you do or say will be far from perfect, and that’s normal and acceptable. Speaking from the heart is far more powerful than finding the perfect words to speak.

- **Create a Psychological Safety Zone:**
  Create a workplace safety zone, physical or virtual, where workers feel comfortable asking each other how they feel about what happened. No one should worry that they will be ridiculed or embarrassed by speaking freely.

- **Channel Emotions into a Stronger Organization:**
  Rather than feel despondent or hopeless about the future after tragedy strikes, reframe those emotions and channel them into a stronger resolve to build a resilient organization capable of supporting workers’ emotional needs.

- **Allow Time for Emotional Processing:**
  Place a momentary hold on business and shift conversations to more difficult topics. Yes, we all have important work to attend to in our organizations, but in the wake of a dark times crisis, our daily routines and deadlines are less important than giving ourselves time to share what really matters.

The unpredictable nature of crises makes them virtually impossible to adequately prepare for in advance. While leadership education may offer some help with preparation, leaders should know that the only way to truly fail in a crisis is to do absolutely nothing.

**Reflecting on Crucible Moments**

No one who aspires to lead can accurately anticipate times of crisis or how they will deal with their own crucible moments. The unpredictable nature of crises makes them virtually impossible to adequately prepare for in advance. While leadership education may offer some help with preparation, leaders should know that the only way to truly fail in a crisis is to do absolutely nothing. Whatever response a leader makes, the outcome is likely to be better if they have studied crisis leadership and are aware of strategies for anticipating, weathering, and recovering from a crisis. Leaders may lament their crucible moments, but those who use them as sources of learning and reflection truly transform themselves into leaders who can weather crises with confidence.

Leaders may wish to remember that, according to Jennifer Porter, leadership is about much more than strategic planning and operational excellence. She writes, “A leader sets the emotional tone and example—in good times and perhaps more importantly in bad.” When times are bad, leaders transformed by their crucible moments will face each crisis ready to get that emotional tone just right.

**AALL2go EXTRA**


**STEVEN J. BELL**

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Why SOAR’s Appreciative Inquiry theory may make it a better fit for law libraries.

BY MICHELLE COSBY

Everyone has heard the term “strategic plan” at some point during their career. Strategic planning is a necessary tool used in management, especially at the senior levels. However, despite the level of effort and research put into a strategic plan, many of these plans end up on the shelf for the next three to five years until it is time to update the plan once again. Further, when the strategic planning is primarily completed by senior management, library employees may not fully realize how a good strategic plan can benefit their day-to-day work and guide the vision of the library.
A good strategic plan unifies the goals of the organization, helps steer future decision-making, and guides an organization’s development over the next few years. Many involved in strategic planning are accustomed to using a SWOT analysis (strengths, weaknesses, opportunities, and threats) when developing a strategic plan. However, SOAR analysis (strengths, opportunities, aspirations, and results) can also be used in strategic planning. SOAR analysis is used when an organization is looking to maximize what it already does well, rather than focus on addressing its external or internal threats.

**SOAR vs. SWOT**

SOAR analysis is based on the concept of appreciative inquiry, also referred to as AI. In an organizational setting, appreciative inquiry emphasizes that when beginning the evaluation process, the organization should start by first determining what it is doing right. By capitalizing on the strengths of
the organization already does well, and coupling it with the positive mindset of the appreciative inquiry approach, an organization can experience meaningful change in its strategic planning process. How issues are framed and presented becomes more important when using SOAR analysis.

A key distinction between SOAR and SWOT is that SOAR focuses on capitalizing on an organization’s positive attributes by emphasizing the processes that the organization currently performs well. In a library setting, this can be services or skills. This approach is different from SWOT analysis, which focuses on what an organization is missing, or what is threatening an organization’s existence, such as reduced funding or reduced staffing. However, this is not to say that SOAR analysis does not assist in discovering areas of improvement for the library. Instead of listing threats to the organization, SOAR looks for opportunities for enhancement or development.

Another distinction between SOAR and SWOT is that SOAR analysis places a greater emphasis on involving all library stakeholders, whether those stakeholders are external or internal to the organization. The human element is an important part of SOAR analysis because the stakeholders are an essential part of the appreciative inquiry process. Further, the employees are part of the process to execute the vision of the strategic plan.

Benefits of SOAR in a Library Setting
In general, those attracted to library work have a strong interest in helping people meet their needs. The SOAR analysis approach lends itself to this type of work because of the appreciative inquiry involved when using SOAR. Similarly, SOAR analysis can create increased buy-in from library employees and library stakeholders due to the high level of involvement that those groups have in the process. For external stakeholders, one way to engage them is to have focus groups that are led by library employees. However, at a minimum for SOAR to work, library employees must be involved throughout the entire strategic planning process. Input can easily be gathered by visiting departmental meetings or having a staff retreat focused on strategic planning. Finally, all groups should be allowed to view drafts of the strategic plan and offer input before a final plan is completed.

FRAMING YOUR ANALYSIS: A COMPARISON BETWEEN SWOT & SOAR

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<td>What do our services to our patrons tell us about the abilities of our employees?</td>
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<td>Increased documentation required to maintain relevance to parent organization</td>
<td>How do we turn our strengths and aspirations into a tangible message to our stakeholders?</td>
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RECOMMENDED READING


**Caveats When Using SOAR**

While SOAR analysis has many strengths, there are also some potential drawbacks to consider when determining if SOAR is the best approach for your library’s strategic planning needs. For example, SOAR places a high emphasis on gathering input from all library stakeholders. While it may be easier to gather library employees for input, it can be harder to speak to external stakeholders, such as vendors or partners that are not in your city. Additionally, it takes time to identify the relevant external stakeholders who should participate in the SOAR process. After identifying external stakeholders, it can be hard to find the time to get relevant stakeholders together. It may also be hard to reframe issues in the way required for SOAR. Seeing an issue as an opportunity instead of a weakness may not seem possible or may be perceived as viewing the issue through rose-colored glasses instead of tackling the issue head-on. Finally, similar to SWOT, if the strategic plan sits on the shelf, the process and momentum used to create the plan gets lost.

**Final Takeaways**

As with SWOT analysis, SOAR works best when senior management is interested in moving the library in a new direction and is committed to working toward new goals. While SOAR may appear to be more time-consuming due to the emphasis placed on multiple parties being part of the strategic planning process, the increased buy-in from employees and external stakeholders makes SOAR analysis a good choice for managers looking to increase employee morale and productivity.
Femi Cadmus stumbled into a career in law librarianship as most people do, purely by accident. But after working in her first role as a law library research assistant, she was hooked. Her growth in the profession has been natural, as she has transitioned over time from one leadership position to the next, always with an end goal in sight. Throughout her journey she has remained flexible, adaptable, and always ready to evolve with the ever-changing demands of technology. We are in a time of constant disruption; you must upgrade your skills and learn how to use new technologies in order to stay relevant and avoid becoming obsolete.
Cadmus was born in Manhattan, New York, and raised in Lagos, Nigeria. Her first degree was an LLB (bachelor’s in law) from the University of Jos in Nigeria, a former British Colony, still retains many of the legal traditions of England, where the LLB is an undergraduate degree. After Cadmus received her law degree in 1984, she received a BL from the Nigerian Law School in Lagos and was admitted to practice in Nigeria. Following graduation, she worked as an attorney for two years but didn’t particularly enjoy the practice of law. Not knowing what she wanted to do, she decided she would figure it out while obtaining a graduate degree. She earned her LLM at the University of Warwick in Coventry, England, in 1988, specializing in Law in Development. After returning to the U.S., she decided to seek work as a researcher. She began her career at the University of Oklahoma as a law research/reference assistant while she obtained her MLIS from the University. She was subsequently admitted to practice in New York.

“After obtaining a graduate degree in law, the only opportunity that opened up to me was as a research assistant in a law library,” recalls Cadmus. “The director at the time (Maria Protti) really took a chance on me in the sense that I didn’t have the context for researching the American legal system.” After getting her feet wet in library work, Cadmus was hooked, and found herself fascinated by the variety of questions she received at the reference desk.

In this role, she did everything from cataloging and loose-leaf filing, to maintaining the collection and shelving books. “I did everything from the ground level, for which I’m grateful for,” said Cadmus. “It’s helped me in my career to have a broad perspective and balance as to library operations, and has helped me relate to everyone in the organization.” Her first full-time professional position was at the George Mason University Law Library (now Scalia Law). She started out as an assistant law librarian for circulation and reference, before moving to head of collection development and access services and finally associate law librarian. She stayed at George Mason for 13 years before working as an associate law librarian for administration and lecturer in legal research at the Lilian Goldman Law Library at Yale Law School. She was the Edward Cornell Law Librarian and associate dean for library services and professor of practice at Cornell Law School from 2011 to 2018. She began her new position as the Archibald C. and Frances Fulk Rufty Research Professor of Law and associate dean for library services and professor of information services and technology at Duke Law School in November.

An American Association of Law Libraries (AALL) member for 22 years, Cadmus has served in a number of roles, including vice-president and as a member of the Executive Board, as well as a member of the Strategic Directions Committee, the Finance & Budget Committee, the Diversity & Inclusion Committee, and the Economic Status of Law Librarians Committee, to name a few. She is also a member of the Academic Law Libraries Special Interest Section (SIS), the Government Law Libraries SIS, Private Law Librarians & Information Professionals SIS, Research Instruction & Patron Services SIS, and the Technical Services SIS. Here, she discusses hot-button issues for the Association, what’s next, and how AALL has impacted her career.

Are there any hot-button issues at the top of the Executive Board’s agenda?

As of this writing, the Executive Board has been addressing, head-on, vendor practices deemed as unfair to our members. It’s the way vendors are now bundling their products and compelling users to purchase their platforms in order to
our archives policy. Our archives agreement with the University of Illinois is expiring in 2019, so we need to review how we are managing our archives. There is a possibility of collaborating with LLMC Digital, who has actually approached us and said they would digitize the materials we have left to archive at no charge.

We have also recently completed the process of recruiting a new Executive Director after a successful 11-year tenure by Kate Hagan. This very important position is responsible for executing the strategic goals of the Association, managing the day-to-day operations of Headquarters, and overseeing the work of our dedicated staff. Another initiative will be to create an executive leadership institute for directors across all segments: academic, corporate, firm, and government.

Lastly, we will be incorporating the Body of Knowledge (BoK) into all content areas. Designed as a blueprint for career development, the BoK sets forth core domains, competencies, and skills needed by today’s information professionals. The domains include: Professionalism & Leadership at Every Level, Research & Analysis, Information Management, Teaching & Training, Marketing & Outreach, and Management & Business Acumen.

What do you think the biggest challenges in law librarianship are?
I like to view challenges as opportunities to develop creative solutions. Technology undoubtedly continues to disrupt every industry, the legal services industry and law librarianship not excluded. Technological disruption is often described as a two-edged sword presenting the opportunity for legal information professionals to update and upgrade traditional skills and expertise or risk becoming obsolete and irrelevant. Stay relevant, be willing to be flexible, responsive, and update your skills. Law librarians are here to advocate for the profession, to give stakeholders the tools that they need to advocate for themselves, and to respond to their needs.

Technology has been a major disruptor, not just in legal information and librarianship, but in every industry. Technology is changing the way we teach, it’s changing the way lawyers practice, and it’s changing the way we respond as law librarians.
How do you stay engaged and passionate about your work?

I like to shake things up and have never been afraid to try new things or step into new territory. Networking and professional development opportunities provided by AALL have also helped stoke my passion for work. I’m not a status quo person, in the sense that I feel things can always be done better or done differently. I like to tackle problems and challenges. I’m always exploring. I’m always looking to make sure the library is staying relevant, and sometimes that means collaborating. Doing all this keeps me passionate. Staying in the status quo is the most boring thing to me. If I had to do the same thing the same way every day, I could not stay passionate. Being embedded in the law school, I understand what our stakeholders’ needs are and how to respond to those needs.

I also like to call myself an organic mentor; I have a few people that I regularly meet up with to discuss things, for example, what’s going on with work and what challenges have come up. I find working with up-and-coming librarians or those new to the profession to be very fulfilling and rewarding.

What is one of the most valuable lessons you’ve learned in the professional leadership positions you’ve held?

Develop a vision early and stay on course. If you don’t have a vision or something you are working toward, you’re not focused, you don’t have a goal, and you are unlikely to achieve the desired result. You end up just kind of moving along aimlessly. What I learned very early as a leader is that it is essential to have a vision and know where you are going and what you hope to accomplish. Once you develop that vision, stay focused.

What’s the value in being a member of AALL?

There is tremendous value in being a member of AALL, but I cherish the connections and the deep professional network that I have cultivated the most. I joined AALL in 1996, and I find the strong professional network and solid immersion on professional education to be so incredibly valuable. Our members are very knowledgeable, skilled, and above all, very willing to assist. This has been so important for me in my career advancement. I can call any librarian up and say, “Hey, I have this issue, I don’t understand this one thing,” or “I need this book,” or “I can’t find this article.” Everyone is always so generous to help with whatever issue you are having. That network couldn’t exist if we didn’t have this Association. I also enjoy the professional programming from the AALL Annual Meeting and programs from chapters—you can’t put a price tag on all these benefits, they are priceless.

What is the best career advice that you have been given?

To always have a balanced perspective—keep the big picture in mind and do not engage in distractions by sweating the small and inconsequential stuff.

What do you find most rewarding about your job?

Helping people succeed and meet their goals. This could include helping faculty and students with their research, or it could be helping a researcher from a developing country who doesn’t have access to legal information. It could also mean mentoring a newer librarian. The human element is what matters most.
Question: Professional development is important to career success. How do you provide ongoing professional development amidst budget constraints?

Forgive this cheesy paraphrase of Sir Francis Bacon: “If the mountain will not come to the Harris County Law Library, the Harris County Law Library will go to the mountain.” Instead of trying to find external professional development opportunities that can be squeezed in amidst the constraints of our limited operating budget, we’ve created and implemented our own internal professional development opportunities—to wit, the Harris County Law Library’s Legal Tech Institute (LTI).

LTI is the brainchild of Joe Lawson, the law library’s immensely talented deputy director. Originally conceived as a collection of free, hands-on tech learning opportunities for our patrons, LTI courses also offer all library staff members the chance to learn about legal technology, free of charge, and without having to leave their friendly confines. Most of our staff members have taken advantage of LTI course offerings and have expressed gratitude for their availability.

Our recent partnership with Procertas also provides us with an additional crossover opportunity for the library staff’s professional
I am a strong believer in the value of professional development and networking with peers. In my first professional position, I was encouraged to join AALL, the Association of Boston Law Libraries (ABLL), and the Special Libraries Association (SLA), and I have maintained those memberships throughout the years. I also encourage my newer law librarians to attend CONELL (Conference of Newer Law Librarians) at AALL’s Annual Meeting.

I am lucky in that the firm I currently work for is a strong believer in professional development. We actually have an annual professional development requirement to meet. I am able to budget for memberships to AALL, ABLL, SLA, and Law Librarians of New England for myself and the three librarians on my staff.

These organizations all offer a variety of online seminars, providing a great cost-effective tool for professional development. We will share the slides and recordings with each other, fostering great discussions and helping to develop new ideas within our library. Our firm is also a member of the International Legal Technology Association (ILTA), and I encourage my staff to sign up and make the most of the excellent educational opportunities that ILTA provides regularly. I also belong to the Law Library Association of Greater New York and the Law Librarians’ Society of Washington, DC. I find that the lower-cost local memberships provide great value—I can tap into a larger community, attend any online events, and plan my travel to our other offices to coincide with any in-person events I would like to attend.

I also budget for each librarian to attend one conference each year. ARK’s Best Practices and Management Strategies for Law Firm Research & Information Services Conference, held annually in New York, and AALL’s and SLA’s annual conferences are the most frequently attended conferences. I also review the programs at ILTA and LegalTech each year and consider attending those events as well.

Vendors are also a good source of free professional development. Lucidea has been running a very good series of WebEx seminars on Succeeding in the World of Special Librarianship, for example.

I also subscribe to many blogs and newsletters to stay up to date. I recommend the PinHawk Librarian Daily Digest, Dewey B Strategic, 3 Geeks and a Law Blog, and AALL’s KnowItAALL.

I also use social media for professional development, and participate in professional groups and discussions on Twitter and LinkedIn to help me stay current. It can be time-consuming, but I find it valuable.
As the plane descended into San Juan, I peered out my window and could see countless blue tarps in the neighborhoods surrounding the airport. More than four months had passed since Hurricane Maria ravaged the island in September 2017, and tens of thousands of these makeshift “blue roofs” now dotted all corners of Puerto Rico in place of roofs lost during the storm. I did not know it at the time, but this would be the first of many still-visible reminders of the destruction wrought by Maria’s Category 4 winds and rain.

Maria’s Aftermath
I found out I would be accompanying my law school’s Puerto Rico Recovery Assistance Legal Clinic a few days before we were scheduled to leave, and in the scramble to book a flight and pack up, I did not have time to prepare myself for what I would find when I landed. The tourist areas...
of San Juan had more or less returned to normal, but traffic lights were still out across most of the city, and even here, in one the most densely populated areas of the island, some residents were still without power.

The situation at the University of Puerto Rico, where we worked when we were not in the field, was similar to the rest of San Juan; however, some areas of the campus, including the third floor of the Law Library, which had sustained significant water damage, remained closed for repairs. Samuel Serrano, the interim director, explained that the library sustained significant damage during the storm due to winds and flooding, and that staff were unable to reach the library until five days after Maria had passed through. Thanks to their herculean efforts, most of the library was open to students by the time I visited, and it reopened to the public in early February of 2018. Moreover, despite their many additional responsibilities, Serrano and his staff were gracious enough to assist the students and me with questions we had about local resources.

The Puerto Rico Recovery Assistance Legal Clinic

The Puerto Rico Recovery Assistance Legal Clinic was the brainchild of Vice Dean Kim Connolly, who directs our clinical legal education program at the University at Buffalo School of Law. After watching news coverage of Hurricane Maria’s impact on the islands, she began planning what would become the law school’s newest clinic, dedicated to “provid[ing] practical legal research and thoughtful pro bono service, through an ongoing collaborative effort to empower a resilient Puerto Rico.”

The students who participated in the Clinic were selected based on their diverse talents and backgrounds. One of the students was a native of Puerto Rico, and other students were conversant in Spanish; some students had experience in areas of urban planning and sustainability, or in preparing presentations and working with community groups. Before leaving for Puerto Rico, the students each chose an area to research, ranging from community-based agriculture and power generation to issues with federal disaster relief or the local criminal justice system in the wake of the hurricane.

On the first day outside of the city, our group of nine students split into two “brigades:” one legal and one humanitarian. I traveled an hour and a half west to Quebradillas with the Legal Brigade where we assisted attorneys with Ayuda Legal-Puerto Rico who were helping survivors file FEMA (Federal Emergency Management Agency) appeals. Our native Spanish speakers were able to participate most directly in client intake and assistance while those of us who were less fluent researched issues related to the appeals process or called the FEMA Help Line for the attorneys, as the wait time for assistance in English was far shorter than for Spanish speakers.

As we would come to discover, assistance with FEMA appeals was desperately needed across the island. Apparently, some inspectors who were paid by FEMA to provide repair estimates never contacted the applicants or set foot inside the homes they were supposed to inspect before submitting their reports. In Quebradillas, we met survivors whose requests for assistance were met with outright denials, or were so low that they might as well have been denials. One client in particular received an offer of $1,000 in assistance to repair her home, which she described as “a total loss.”

On the first day outside of the city, our group of nine students split into two “brigades:” one legal and one humanitarian. I traveled an hour and a half west to Quebradillas with the Legal Brigade where we assisted attorneys with Ayuda Legal-Puerto Rico.

The force of Hurricane Maria’s winds blew the roofs off many homes on the island. The fact that this home does not have one of the blue tarps supplied by FEMA indicates it was likely abandoned after the storm.
On our second day in the field, my group headed to the south coast of the island to hand out solar lamps, cell phone chargers, towels, and toiletries. Here in the hills of rural Arroyo, survivors had been without power and potable water since Hurricane Irma hit Puerto Rico with a glancing blow two weeks before the direct hit of Hurricane Maria. We met a mother doing her best to care for her newborn, and several families struggling to care for bedridden grandparents, all still without power and running water.

Some of the residents we met fought back tears when we handed them their solar lamps, knowing they would have a dependable source of light that night for the first time in months. Despite the privation we witnessed, people in this isolated community seemed to have pulled together and were in good spirits. And while it was very gratifying to help our fellow citizens, we shared their frustration that they had lived so long without the most basic necessities.

Upon returning to San Juan each evening, we would reconvene at the students’ Airbnb rental, which they nicknamed “The Big Brother House,” to plan the next day’s activities and work together on their research projects. It was great to unwind with the students in this more relaxed environment and get to know them better while also providing intensive, in-person research support in a way that would not have been possible had I stayed in Buffalo.

Additionally, while the students saw firsthand the effects of poverty and the storm, and had some very spirited arguments at times, they maintained a very positive outlook during my time with them. We even managed to have some fun together. Upon our return from Arroyo, which was perhaps our most difficult day together, my group (we decided to call ourselves the Sharks) choreographed a Westside Story-style dance to challenge the other students who had spent the day providing legal assistance on another part of the island. Thankfully for my sake, a full-scale dance-off did not ensue.

While I had to head home after five days, the students and Vice Dean Connolly remained for an additional five days, continuing on their legal and humanitarian missions and meeting with key stakeholders in the legal community. Their efforts would lay the groundwork for the next group of students who headed to Puerto Rico in July 2018 to continue the work of the Clinic.

Road to Recovery
Puerto Rico has a long road to recovery ahead, but the people there demonstrated a level of kindness and resilience that I did not expect to encounter given their circumstances. Being able to help them and work so closely with students was truly the highlight of my library career. I am very grateful to my director, Beth Adelman, for suggesting that I accompany the Clinic, and to Vice Dean Connolly and the students, for making me feel so welcome.

I was thrilled to join a new group of students in Puerto Rico this past summer, and I feel very fortunate to have built upon the strong relationship my library has developed with our clinical program, without which this opportunity would not have been possible. I sincerely hope that my law librarian colleagues will be able to participate in similar initiatives through their own institutions.

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In a recent *Law Library Journal* article titled “The Algorithm as a Human Artifact: Implications for Legal [Re]Search,” Professor Susan Nevelow Mart examined several major online legal databases and showed that they returned different results to identically worded queries based on the preferences and biases of their search algorithms. (Read the article at bit.ly/LLJS17algorithm.) In the course of her research, Professor Mart also ran a small-scale test to see whether prefiltering or postfiltering a search returned fewer results in each of the databases.

“Prefiltering” is a method of searching full-text legal databases where a researcher first applies as many limiting filters as possible (e.g., filtering by jurisdiction, content type, publication date, etc.), and then runs a natural language search within the database. “Postfiltering,” on the other hand, is where a researcher searches the entire database using natural language first, and then applies filters to the results that come back.
Prefiltering, as the conventional wisdom goes, is the superior search method because it returns fewer, more relevant results, and has fewer false positives. As Professor Mart puts it: “until recently, it has been an inviolable law of search that as recall goes up, precision goes down.” Given that prefiltering traditionally returned fewer results than postfiltering, researchers justifiably assume that prefiltering is the superior search method of the two. It’s the way I was taught to search databases in law school, the way I instruct patrons to search databases now, and the way I conduct most of my searches—apply my filters first, and then search for my keywords.

Professor Mart found that prefiltering in Lexis Advance, Google Scholar, Ravel, and Casetext returned the same number of results as postfiltering. If you think about it for a minute, this makes sense. If you search for the exact same terms and apply the exact same filters within the same database, then it should not matter which order you search for the terms and apply the filters: you’re ultimately searching the same pile of information using the exact same parameters. The number of results should be the same.

However, when Professor Mart ran the same test in Westlaw, she found that prefiltering returned more results than postfiltering:

“Research assistants were given sample instructions on limiting their search to a specific case database for each of the six databases in the study; in the example used below, the reverse was true for Westlaw; prefiltering produced more results. Here were the instructions:

- On the left, click open the District Court box and select your actual district (e.g., E.D. Mich.). Also use the filters on the left to limit your searches to reported cases and click Apply Filters.

Note that in Westlaw, the results are different if you follow this path (2,920 cases) than if you enter the search in the main search box first and then use the filters (clicking on cases/jurisdiction/reported) to limit the jurisdiction (4 cases).”

This finding is bizarre. Based on my understanding (and perhaps yours, too) of how databases like Westlaw work, it should not matter whether you apply the filters before or after you run an identically worded natural language search. You are searching for the exact same words and using the exact same filters; therefore, you should get the same number of results both times, regardless of the order you select words and filters. Furthermore, our received wisdom tells us that there’s no way a prefiltered search could return more results than postfiltered searches. Fewer results? Sure, the postfiltered search could pick up false positives. But more? No, that wouldn’t make sense.

Yet, if Professor Mart’s one-off finding is more broadly true, it would present a seeming impossibility: prefiltered searches returning more (and in some cases, dramatically more) results than postfiltered results. It would also raise two serious questions. First, how does Westlaw’s search algorithm actually work, such that identically worded and filtered searches could produce two different numbers of results? Second, if prefiltering does not return fewer results than postfiltering, is prefiltering still the undisputed best method of search?

**Search Method**

To get to the bottom of these questions, I tested whether Mart’s isolated finding is true, that prefiltering in Westlaw can return more results than postfiltering. In order to provide a fuller picture of this phenomenon, I also tested LexisNexis, Bloomberg Law, and the new Westlaw Edge. I adopted Professor Mart’s method of pre- and postfiltering, changing it only slightly to accommodate negligible differences in Lexis’s and Bloomberg’s interfaces, and also in order to scale-up my results:

**Postfiltered Results**

1. Enter the natural language search string into the main search bar and run the search.
2. Select “cases” on the left-hand side.
3. Click the drop-down menu for “states” under “cases” and record the number of results for each of the following states: California, Texas, Illinois, and Florida. If a state does not appear in the drop-down menu, mark it zero.

**Prefiltered Results**

1. Click on “cases” on the home page.
2. Select the state (California, Texas, Illinois, and Florida).
3. Select the filter for state cases only (exclude federal cases).
### WESTLAW SEARCH RESULTS

<table>
<thead>
<tr>
<th>KEYWORDS</th>
<th>STATE</th>
<th>POSTFILTER RESULTS</th>
<th>PREFILTER RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Innkeeper liability guest property reasonable time”</td>
<td>Florida</td>
<td>1</td>
<td>39</td>
</tr>
<tr>
<td>“race restrictive covenant void public policy”</td>
<td>Illinois</td>
<td>4</td>
<td>72</td>
</tr>
<tr>
<td>“basis court award attorney’s fees”</td>
<td>California</td>
<td>303</td>
<td>3354</td>
</tr>
</tbody>
</table>

4. Once you have selected the state cases, filter for your state, enter your natural language search string, and run the search.

5. Record the number of results that the search returned.

I tried to devise keywords with phrases of legal significance that were also broad enough to generate hits in the databases. My results are as follows.

**Findings**

In LexisNexis, I ran 40 identical searches and recorded the number of prefILTERed and postFILTERed results for each. In every instance, without exception, the number of postFILTERed results equaled the number of prefILTERed results. Similarly, in Bloomberg Law, I ran 40 searches and recorded the number of prefILTERed and postFILTERed results; again, in every instance, the number of postFILTERed results equaled the number of prefILTERed results.

In Westlaw, I ran 100 identical searches and recorded the number of prefILTERed and postFILTERed results. In every instance, the number of prefILTERed results exceeded (often dramatically) the number of postFILTERed results. In other words, Professor Mart’s single test from her *Law Library Journal* article was not a fluke: in Westlaw, prefILTERed results really can dramatically outnumber postFILTERed results of identically worded queries. The chart above contains a selection of a few of the more dramatic splits.

I also had the opportunity to test Westlaw Edge, West’s new online legal research interface, for the same phenomenon. In some respects, Edge’s interface is a little different than the old Westlaw interface: a color palette that’s easier on the eyes, a more spacious layout, and new tools more prominently featured. But for the purposes of my test, Edge’s results were virtually identical to the old Westlaw: prefILTERed results outnumbered postFILTERed results in every single search. So, even if Westlaw Edge does become the new standard for Westlaw users, prefILTERed results still outnumber postFILTERed results.

**What This Means**

Upon examining the lists of cases in Westlaw that each method of search returned, there is no immediately discernible characteristic of the cases that made it into the prefILTERed results but not into the postFILTERed results. Specifically, cases were not excluded from the prefILTERed results on the basis of being unreported, “red flag” cases, cases from a specific court, cases from a specific time, or earlier or later cases relating to the same matter. However Westlaw is deselecting cases from the postFILTERed results, it is not readily apparent to me.

Nor is it apparent how identically worded searches, using identical filters, and differing only in the order in which you enter the words and filters, could return different numbers of results. Clearly, I do not understand some important aspect of Westlaw’s search algorithm. Is it possible that searching from the home screen automatically engages filters and parameters that manual filtering does not? Does post-filtering automatically search within a more circumscribed universe of information to begin with? I have no answers to these questions, but if we hope to use Westlaw as effectively as we can, then they do merit further investigation.

Postfiltering is not necessarily the best way to search. Searching for legal information is more complicated in the real world than my test can replicate. But this result at least begs the question: How reliable is our body of received wisdom? If the maxim, “Prefiltering is better than postfiltering,” is no longer categorically true, then perhaps we should question other bedrock assumptions about research best practices, before the sophistication of our tools and our ability to understand how they actually work diverge too far.
Speaking with Scannx

For the past six years, Scannx has provided thousands of libraries with an easy, economical way to copy photos, documents, and portions of books. In 2008, shortly after retiring from serving as president of document scanning technology provider Visioneer, Murray Dennis decided to drop off some overdue library books that he noticed his sons had left on the kitchen table.

As he was leaving his local library, Dennis was surprised to see several students depositing change into the library’s copy machine to reproduce book pages.

“I said to myself, ‘I just spent the last 10 years providing Fortune 500 companies with digital imaging solutions,’” he says. “‘And my city library is still using 60-year-old paper-based copier technology?’”

When, shortly after that day, a company Dennis knew approached him for advice about marketing their specialized book-edge scanner, he had an idea. The scanner, he says, did a great job of preventing book binding damage during the scanning process, but libraries didn’t seem interested in acquiring it because it appeared to be more complicated to operate than a copier.

“The need for a turnkey solution, especially for library patrons, seemed obvious,” Dennis says. “I decided to combine the book-edge scanner with a dedicated touchscreen computer, put together a software development team, and founded Scannx in 2010.”

After two years of additional software development, the company launched its first Scannx-branded product, the Book ScanCenter, in 2012.

In addition to producing its own scanning devices, the company has since partnered with Zeutschel and other manufacturers to create copier-replacement solutions that can scan up to an 18” x 24” area, produce a non-skewed image, and instantly store scanned content from books, documents, and photos in digital destinations such as Dropbox or Google Drive.
We recently spoke with Dennis, Scannx’s CEO, about the benefits scanning systems can provide, the influence law librarians have had on the features Scannx offers, and how the company’s products are helping law students, attorneys, and other industry members successfully share information.

Has the company’s goal changed since Scannx was launched?
Our fundamental mission remains the same: providing an easy-to-use portal for people to convert documents and images to digital and audio formats, enhancing the efficiency of their research and collaboration. The scanning tools and software available to accomplish this are increasing all the time.

How did you initially promote Scannx’s first product to the legal industry?
We introduced the Book ScanCenter at library conference trade shows. From my days at Visioneer, I knew that the legal profession had adopted scanning as an essential tool for work efficiency. So it seemed only logical to exhibit Scannx technology at law library conferences.

When Scannx entered the market, librarians expressed real excitement about providing book scanning services to their patrons for under $5,000, as opposed to the $25,000 price of the other book scanners available at the time. The Book ScanCenter cost less to operate than copiers.

How have Scannx’s products changed since being launched?
We’ve focused on enhancing the value of Scannx software as a tool for easily managing newly captured digital images. Scannx software includes scanning capabilities for photos, rare books, and documents. We also extended ease-of-use by adding accessibility features for visually impaired users to meet libraries’ ADA requirements. We now support libraries being able to archive projects in PDF-A and MRC formats. We added the ability for libraries to connect to nonprofit global library cooperative OCLC’s interlibrary loan (ILL) software, Tipasa, and we enhanced Information Technology (IT) support by adding error reporting to our cloud management software.

Because Scannx systems were created to serve the public, we made the addition of security features a priority. We host all our client cloud services on Microsoft Azure, a state-of-the-art platform for security, privacy, redundancy, and reliability. This prevents cyberattacks and resulting downtime that can plague companies hosting client data on more vulnerable private servers. We offer two-factor user authentication to all cloud destinations and email security options to prevent the nefarious use of our systems to send anonymous emails.

Do you primarily serve large law firms or law school libraries?
Both law students and lawyers work in an information- and paper-intensive environment. Both gather materials for research and presentations. In addition to our flatbed book-edge scanner, Scannx software links to a high-speed (120 images per minute) document scanner. The optical character recognition (OCR) technology is very important, in terms of accuracy and speed, to this segment of the market because they need to be able to search large PDF files quickly. Scannx’s software architecture scans and adds OCR capabilities to documents simultaneously, eliminating any additional wait time for document formatting—whereas most other systems cannot perform OCR on a document until they have first scanned all the documents in a stack, possibly creating much longer wait times.
Do law firms and academic libraries use Scannx products differently?

Academic use is far more wide-ranging, serving the needs of undergraduate and graduate students, faculty, visiting researchers, and members of the public. Most of the 130 million pages our systems have scanned have been from academic and public libraries. The average session involves six pages, and most were saved to email or a USB device. Only about three percent of all scans went to print, reducing the cost of paper and toner for those customers and saving trees.

Lawyers and staff at firms with their own libraries use our scanners as a tool for consolidating and sharing research or case materials. As with academic librarians, law firm librarians tell us that user-friendly operation is very important to accommodate the various levels of lawyers’ and staff members’ technical expertise. In addition to our book-edge scanners, law firms would probably use our high-speed document scanners and scan more pages per job than academic libraries do. The preferred scanning format for legal work and research is a searchable PDF, whereas a regular PDF is the predominant choice of users in other libraries.

Because the practice of law is paper-intensive, more scans may go to print as well. Still, the availability of materials in digital format likely reduces the amount of paper and toner used to share information, just as it has in academic institutions.

Do any customers from other industries use your products?

In addition to academic, public, and law libraries, we serve state and federal government agencies, the military, private special collection libraries, and historic and genealogical organizations.

Have law librarians provided any input that’s helped shape the products Scannx offers?

Yes. We are very customer-driven. We attend at least 10 library trade shows a year, including those for law libraries, and we stay in touch with our customers. We receive valuable feedback from law librarians about their needs and get many ideas for future enhancements.

Through the process of speaking with many law librarians and other vendors serving this market, we can identify emerging trends and needs for the legal industry.

What features do law librarians tell you are the products’ main selling points?

As with other libraries, ease of use seems to be the main selling point. The specific features they like the most are converting files into searchable PDF format, the use of high-speed document scanners, and cloud storage.

Law students are very tech-savvy. The IT staff prefers the ability to track and manage multiple scanning systems from a single location, or even on the road from a smartphone or tablet. For public access county law libraries, our ability to provide scanning linked to a variety of payment systems has been a selling point, as well.

Are there any limitations to the file size patrons and library staff members can send?

Scannx software allows the library to set its own limits on the number of pages scanned per session if desired. A file size limit can vary for each scanner. The practical size of a scanning job is only limited by the email transmission capacity, the size of a portable USB drive, or the restrictions of a user’s cloud storage destination. When sending scanned images over the internet, we automatically disable the 600-dpi option to prevent transmission errors.

Have any aspects of the legal document scanning industry changed in recent years?

As a tool for attorney collaboration and research, I think scanning has replaced a significant amount of copier use, and the availability of very low-cost cloud storage has created a very cost-effective solution for saving scanned documents.

Do you plan to make any changes to your products in the future?

We are planning the development of a downloadable cloud-based app that will allow users to operate Scannx systems from a screen on their smartphone or tablet. This will allow libraries to provide more scanners without the additional expense of providing an integrated touchscreen computer or PC for each scanning device. Longer term, we see the need to automate the process of adding metadata to files, enable object recognition within photos, and link scanned pages automatically to other relevant works, as specified by the user.

What do you think future document scanning needs will be in the legal industry?

Security and confidentiality will continue to be a high priority for scanning and storing legal documents. Tools that scan and automatically catalog a document or photo with relevant information and integrate with industry-standard vertical applications are examples of what the future may hold. We are constantly building the company infrastructure to develop new products, additional links to applications, and the security features that are needed to keep clients up to date in today’s rapidly changing technical environment.

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### SCANNX: BY THE NUMBERS

**Book scanning systems shipped:**
More than 3,000

**Pages customers have scanned:**
More than 130 million

**Pages customers are expected to scan in the next 12 months:**
More than 30 million

**Percent of scanned pages that were printed:**
3%

**Percent that were sent to digital destinations:**
97%
The great thing about librarianship is that it is so versatile. A librarian’s skill set can and should transfer from one library type to another without too much disruption. However, there are striking differences between being a librarian in a law firm and being a librarian in an academic or government library setting. Our Reference Desk columnists offer up their advice on making the transition smoother from one library to another.

After enjoying several years working as a law librarian in one institution, I recently decided to take a leap and transition to a new position in a different library type, and in a new city. I’m mostly excited, but slightly apprehensive. What’s your advice for making this change as painless as possible?
Scott: You’re not going to find a lot of librarians that will give you the cold, hard truth, but you turned to *AALL Spectrum* for a reason, and I’d like to reward that faith in us with a cold splash of honesty in your face. You have to treat your first day at any library like your first day in prison. Pick out the biggest, meanest-looking librarian in the office and start a fight. You’re trying to establish right off the bat that you’re either an alpha dog or you’re a little crazy, but either way you’re not going to be pushed around. I’m getting ahead of myself though. I should introduce myself and discuss my advice-giving credentials before getting too deep into specifics.

In September of last year, I started a new job as the student services librarian at the University of Chicago’s D’Angelo Law Library. Prior to that, I spent six years at Chicago-Kent College of Law. I’m sure you know this already, but the two emotions you’re feeling (excitement and apprehension) are completely normal and show that you respect your new institution and colleagues enough that you want to do a good job and make a great first impression. In a way, I’m working through the same thing you are in this, my very first Reference Desk column. I’m excited to represent the “academic” voice in this column, yet apprehensive about how I’ll be received. We’ll both figure it out together.

I think that the best advice for anyone in the early days of a new job is to remain adaptable. At your last job, you undoubtedly learned lessons about yourself, the type of employee you want to be, and the type of environment you want to work in. It’s important not to allow those lessons to translate into expectations about anything other than your own performance. Every work environment is different, and remaining flexible and open to learning about your new place of employment will put you in the right mindset for success.

You were seen as a good fit as an individual within the organization. Show your new colleagues that you made the right decision by being positive and socializing with them when it’s appropriate (but be careful not to overshare—at least at first). Learn about your new city (everyone loves to talk about their city—restaurants, transportation, entertainment, etc.), and ease into the actual “work” part of work. The good news is that the first week will typically be some combination of formal onboarding and meeting people, so do your best to remember names and smile a lot. Outside of your immediate institutional network, I would echo Maribel’s (Spoiler alert!) encouragement to become active in your local AALL chapter. It’s a quick way to expand your social and professional network, and it will give you a chance to learn more about your new city.

Good luck with your new job, and if you’re curious about my first days at Chicago-Kent and the University of Chicago, ask Tom Gaylord and Bill Schwesig, respectively. If they have the courage, they’ll admit how much respect I earned from them on my first day.

Dolly: I spent five years at a public law library, three of them as director, before moving to a public library in a management position this spring, so I can relate to your situation! I definitely appreciate Scott’s take no prisoners (pun intended?) prison-yard approach above, but for me, I didn’t have as much need to establish my dominance early, having come from a public library background.

Before starting any new job, I always re-read Michael D. Watkins’s *The First 90 Days*. (And by always, I mean I’ve read it twice now.) I should probably get a cut of the royalties from this book; I recommend it for anyone changing jobs or roles within organizations, but I also think it can help even if you’re not changing jobs. Watkins offers a lot of practical, grounded strategies on getting up to speed, setting yourself up for success, and fitting into a new hierarchy. He also tells you what to watch out for, how to spot warning signs, and how to overcome potential conflicts.
Onboarding is always an overwhelming and confusing time. Keep in mind that the persistent feeling of confusion is absolutely normal; take the time to get comfortable, ask questions, and learn from your new colleagues. You’re going to be great!

**Maribel:** Congratulations on your new job! I spent the first years of my career as an academic law librarian in the Midwest before transitioning to a research analyst position at a law firm in one of its West Coast offices. From experience, I can assure you that while all these changes can be daunting, they can also provide invaluable opportunities to learn and grow.

Within your new institution, try to find at least one new colleague to whom you feel comfortable asking questions, and whom you trust to answer your questions honestly. Learn as much as you can about your institution and your team. For those in virtual teams, this may prove to be a much more difficult task, but starting a new job with a friend on staff makes the transition so much easier.

Join, and become meaningfully involved in, an American Association of Law Libraries (AALL) special interest section (SIS) that corresponds to your new library type or the local AALL chapter closest to your new home. It can feel very awkward joining a new local chapter and not knowing anyone, especially if you were already very involved in another chapter, as I was. It will probably be easier than you think as long as you are open to it. At both my first CALL (Chicago Association of Law libraries) and NOCALL (Northern California Association of Law Libraries) meetings, a longtime member saw me standing alone, introduced herself to me, and offered to help me become more involved in the chapter. Take advantage of the learning and networking opportunities offered by these groups by attending meetings and social events, participating in educational programming, and joining committees. Make yourself visible by volunteering early and often for any opportunities of interest. Outside of your local chapter, take some time to explore and get to know your new city.

Find a mentor—perhaps someone from your new institution, SIS or local chapter—to assist you as you learn how to navigate your new position, new library type, or new city. I’ve found people in this profession, and particularly at AALL, to be especially welcoming of new faces. If you need assistance in finding a potential mentor, leverage the connections you’ve already made to find new ones. Chances are that someone with whom you’ve worked in the past can make an introduction. If not, let Dolly, Scott, or me know, and we’ll find someone for you!

Again, congrats and good luck!
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› An entry to annual $500 Amazon gift card drawing

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111TH AALL ANNUAL MEETING
BALTIMORE

From educational programs galore, a dynamic exhibit hall, and countless networking opportunities, to our raucous keynote speaker John Waters, and our Innovation Tournament (sponsored by Bloomberg Law) that saw finalists present their innovation plans to a rapt audience and a panel of judges, the 111th AALL Annual Meeting & Conference demonstrated how legal information professionals are putting knowledge to action. Below are some of our favorite moments from the conference.

[1] CONELL: Held every year to welcome newer members, introducing them to AALL and its leaders;
[2] Opening General Session: Keynote Speaker John Waters delivered a raucous speech that touched on a little bit of everything—bringing the audience to a fit of laughter;
[3] Association Luncheon: Colleagues came together to honor AALL members for their outstanding contributions to law librarianship;
[4] Innovation Tournament: Winners were awarded $2,500 each to implement their innovations. Congratulations to Judges Choice Winner: Ayyoub Ajmi (Using CiviCRM as a Comprehensive Care Management Tool), and Audience Choice Winners: Todd T. Ito and Scott Vanderlin (Browser Extension [Superseed] to Determine the Version of a Cited Statute); [5] AALL’s Member Services Pavilion: Attendees got up close and personal with the 2019 AALL Executive Board candidates; [6] Exhibit Hall: Attendees chatted with 80+ exhibitors about the latest products and innovations.

See more photos at bit.ly/AALL18photos

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