# PLL PERSPECTIVES

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Fall 2011

## PLL CHANGE AS ACTION SUMMIT

reviewed by Elaine M. Knecht, Hiscock & Barclay, LLP, Buffalo, NY

In Philadelphia on Saturday July 23, 2011, I was joined by 249 of my closest law librarian friends for the second annual Private Law Libraries Special Interest Section Summit. There would have been even more librarians in attendance but for the cap on registration dictated by the size of the room in the Pennsylvania Convention Center. Before we talk about the presentations, breakout sessions, lunch, and sponsors, let's drop back to Friday evening.

The Union League was founded in 1862 as a patriotic society to support the policies of President Abraham Lincoln. More than a century later, it continues to give support to the American military, driven by its founding motto "Love of country leads." Construction of the League's French Renaissance-style house – no ordinary club house, this – was completed in 1865. The building houses a significant art collection and comprises several banquet and private meeting rooms, one of which played host to the BNA-sponsored Change as Action Summit opening reception. As is always the case with meetings of this type, here was the opportunity to renew old friendships and meet new acquaintances before the serious business of learning and sharing began the following morning.

Kate Martin was the chair of this year's Summit. She brought together the impressive array of speakers, moderators, and sponsors that made for an enjoyable and important day for all attendees. Priory Solutions kindly provided the breakfast, and the great double-insulated drink glass with screw-on lid and loss-resistant straw that was described by Greg at 3 Geeks and a Law Blog. Kate opened by reminding us of the importance of our roles – how the skills that we bring to the management of information in our firms make both us and it (the info) more valuable to our patrons.

Hildebrandt Baker Robbins is the world's largest provider of management consulting services to law firms and corporate law departments. Jim Jones is HBR's senior vice-president and chairman of the Hildebrandt Institute, the HBR division for executive education and training programs. He was introduced by Jean O'Grady and dove right into his presentation on "The State of the Legal Market in 2011: Redesigning Law Firm Strategy in a Post-Crisis World." (We **thought** we were in a post-crisis world back at the end of July. Did any of us suspect that the Dow would be off another 6%, or maybe more, by the time the next issue of *PLL Perspectives* was released?) I would be remiss if I did not point out that at the beginning of his talk, Jones referenced Richard Susskind's <u>The End of Lawyers: Rethinking the Nature of Legal Services,</u> and recommended it to us all.

Everything has changed, and even if you were not at the Summit, I believe you will be able, in your mind's ear, to hear what Jones had to say about those changes. They are driven by the dramatic increase in the availability of information; by the drive to commoditization of legal services; the growth of enabling technologies; the emergence of new service and content providers; and a lopsided economic model. By the last, he refers to the legal industry's long history of regularly raising rates without regard to the surrounding situation. This came to a crashing, well … crash, in 2009. And now firms are running as fast as they can merely to maintain acceptable levels of profitability.

Inasmuch as Jones believes that information is the key driver for law firm success, and that the free flow of information is driving the competitive market, it behooves all of us to make sure we are an integral part of the gathering, interpreting, and disseminating of that information. Do this, he states, by adding value through creating efficiency and implementing cost effective practices. He wrapped up his presentation with a quote from New Zealand physicist Sir Ernest Rutherford, "We haven't got the money, so we've got to think."

Wolters Kluwer sponsored the next speaker, Esther Dyson. This is not the place for a rundown of Ms. Dyson's accomplishments. If you are not familiar with her interesting activities (i.e. Russian cosmonaut training) or her business involvement (i.e. EDventure – a catalyst for technology start-ups in the US and abroad) or her philanthropic undertakings (i.e. board member of the

*Continued on page 4*

## CONTENTS


# PLL PERSPECTIVES





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### AALL REVIEW



### PLL NEWS




*Continued on page 4*


### PLL PERSPECTIVES DEADLINES

**Fall:** August 15
**Spring:** February 15 **Summer:** May 15

# FROM THE CHAIR

by Steven A. Lastres, Debevoise & Plimpton LLP, New York, NY

Dear PLLers,

This is my inaugural column as Chair of the PLL SIS. I'll be using this column to update you on the progress PLL is making on implementing the new PLL Strategic Directions Plan 2011-2013 we adopted in July 2011.

I'd first like to thank the PLL Summit Committee for putting on a fantastic PLL Summit II, at AALL in Philadelphia attended by more than 250 PLLers. In addition to the Summit, PLL sponsored six AMPC programs and six PLL-sponsored programs at the conference. Looking forward to next year's conference in Boston, Jean O'Grady and Joan Axelroth will serve as the new co-chairs for the 2012 PLL Summit. Feel free to contact Jean and Joan with any programming ideas you may have.

Speaking of AALL 2011, if you'd like to see the handouts and listen to the audio recordings of the program, look at the PLL Summit blog (http://pllsummit.wordpress.com/). Please set aside some time to view this site and listen to the great programs.
The PLL Luncheon at the conference was where we were happy to give the first PLL awards to honor two of our members. For her lifelong contributions to PLL, Joan Axelroth received the Service to PLL Award; the award for PLL Emerging Leader went to Cameron Gowan.

In July, PLL became an official sponsor of the blog *On Firmer Ground* (http://www.firmerground.com), joining other international organizations who represent private law firm librarians. The mission of *On Firmer Ground* is to promote the value law firm librarians bring to the business and practice of law. The blog provides an online forum to share ideas about innovative practice support, adoption of technology to provide process efficiencies, and techniques to be effective business managers of the firm's information resources and know-how. Since its debut, we have already received over 16,000 hits. We encourage our members to contribute posts to the blog. Sign on to the blog to submit your posts.

Thanks to PLL members Monice Kaczorowski, Director of Library Services, Neal, Gerber & Eisenberg LLP, and Holly Pinto, Director of Library Services, Holland & Hart LLP, co-chairs of the AALL PIC Caucus, PLLers have the opportunity to submit articles for publication in Thomson Reuters' *Westlaw Edge.* This bi-monthly electronic newsletter has over 32,000 readers including attorneys, administrators, students, and paralegals as well as law librarians. Share your best practices, your point of view on trends in the profession, or creative solutions to common challenges.

The PLL Resource Guides committee debuted seven newly revised color Resource Guides to explain the value of private law librarians. A new PLL Resource Guides blog (http://pllresourceguides.wordpress.com/) has been created to share this information with our members and the legal industry. To encourage ongoing discussions, we created a page for each guide, to be moderated by the Guide Chairs.

- *Guide Discussions*
  - Guide 1: Hiring
  - Guide 2: New Roles
  - Guide 3: Space Planning
  - Guide 4: Collection Rebalancing
  - Guide 5: Internet Legal Research
  - Guide 6: Negotiations
  - Guide 7: Business Assets

Each of the PLL Subgroups now has co-chairs to better support the members of the subgroups and to facilitate a constant flow of communication on the PLL LinkedIn communities. We especially want to welcome our newest PLL Subgroup, the PLL Knowledge Management Group. Julie Bozzell and Camille Reynolds are the co-chairs of the group and already have sponsored two conference calls on topics of interest to members. All subgroups are in the process of planning education programming for the AALL conference and webinars.

Starting in October, PLL will be deploying a monthly e-newsletter to supplement *PLL Perspectives*, which is now published three times per year. The goal is to provide PLLers with more timely information. By communicating with you on a more frequent basis, the Board believes we can improve our communication with you, our valued members.

To further improve communications with our members, LindaJean Schneider, the PLL Chair Elect and co-chair of the newly formed Membership Committee, is starting a membership drive and will be conducting some membership surveys throughout the year. In that way, we keep our fingers on the pulse of what matters to our members. In addition, LindaJean's committee will be looking to collaborate with local chapters to recruit student and new members to PLL.

I would like to conclude this column where I started, on the strategic role education plays in propelling law librarians forward. To that end, Jennifer Berman and Caren Biberman, co-chairs of the PLL Education Committee, have been busy coordinating and facilitating the work of three Education subcommittees: AMPC, Professional Development, and Summit. The PLL AMPC committee, co-chaired by Julie Pabarja and Sarah Mauldin, has been hard at work reviewing over 25 education submissions for the 2012 AALL Annual conference in Boston. We thank all of you. The submissions for 2012 exceeded the numbers of submissions we received last year.

Finally, please know that it is my privilege to serve as your Chair this year.

PLL Change As Action Summit, *continued from page 1*

Sunlight Foundation, dedicated to increasing transparency and accountability in the US government), please use your mad research analyst skills to learn more about her.

Jean O'Grady began by asking Dyson what she had taken away from Jones' presentation. Dyson's reply? "Is my lawyer overcharging me?" A question and answer session followed, including questions O'Grady developed based on her extensive research into Dyson's activities. Additional questions were asked by PLL-SIS members who were at the presentation. This was, consequently, a wide-ranging discussion that touched on the evolution of computer search (Are we getting both smarter and stupider? Have we lost our ability to think?); failure as an important way to learn; computer users who do not understand the power that advertisers have over the internet (here Greg Lambert came to the microphone and reminded us that if you are using a service for free, you are NOT the client); knowledge for its own sake, and the advantage that will accrue to those who know how to think and who *do* value knowledge; space commerce; US educational policy as regards the natural sciences; and the human genome. All of this in just 60 minutes!

Break-out sessions followed. Each session was led by the person/people who presented as part of the series of webinars we had the chance to attend during the past year. These covered the following topics: administration, knowledge management, law firm marketing, technology, and training. Some folks attended sessions based on those webinars they had attended, others chose the topics they had not covered earlier in the year. Either decision offered the opportunity to share and learn with librarians in situations very much like your own.

Then came lunch. Frankly, I'd be surprised if you haven't already heard about lunch, even if you weren't at the Summit. Look at 3 Geeks and a Law Blog, On Firmer Ground, or the eponymous Connie Crosby's blog. There are links to a complete transcript of the talk. The only things missing are the table thumping, whooping, and applause! Speaker Greg Castanias is the library partner at Jones Day, a firm with 2,500 attorneys worldwide. He told us how librarians add value to their firms, and we loved him. Then he gave the partner's view of the difficulties that we may experience with vendors, and he brought the house down. An audio download of this, and many other presentations made at the Summit, may already be available at the PLL-SIS website. If they are not yet there, check back regularly. You do *not* want to miss this.

Speaking of 3 Geeks, they were the second half of the lunchtime presentation, and just as with their blog posts, they were insightful, witty, and challenging. "So why haven't you answered an Elephant Post?" they asked. Like Jim Jones, Esther Dyson, and Greg Castanias, they encouraged us to get out of our comfort zones, our offices, our library spaces, and bring it! Bring it to partners, associates, practice group meetings, and management. The magic happens "out there" Greg Lambert said, and that's where you want to be.

Lunch, sponsored by Lexis Nexis, was delicious, by the way, and afforded additional opportunities for networking, experience-sharing, and commiserating.

The afternoon featured three concurrent tracks of programming focused on administration, reference/research, and technology/tech services. Each topic had three hours of material, so this reviewer did some cherry picking, choosing those speakers whose presentations seemed most suited to my work and professional development needs. Attendees benefitted from the teaching and insights of the likes of Joan Axelroth (of Axelroth & Associates, providers of legal project management among other things), Colleen Cable (of Cable & Clark, providers of information strategies to law firms), and independent information professionals Mary Ellen Bates, Sabrina Pacifici, and Gary Price.

You'd be hard-pressed to find someone who attended the Change as Action Summit who did not have a good deal of positive feedback to pass along to you. If you were not able to join us, I hope that you will be encouraged to be with us next year. And be sure to look for audio recordings of these exciting presentations at the PLL-SIS website. If they are not there yet, they will be soon, as I know our leaders are working hard to make these available. If you *were* there, be sure to make the most of what you learned by spreading the gospel of librarian value to management. See you in Boston!

Table of Contents, *continued from page 2*

# TO RECOVER OR NOT TO RECOVER: TRENDS, SOLUTIONS, AND ALTERNATIVES FOR TAMING ONLINE RESEARCH COSTS

reviewed by Lucy Rieger, Hasbrouck Heights, NJ

Cheryl Lynn Niemeier, Bose McKinney & Evans LLP, coordinator
Sarah Mauldin, Smith, Gambrell & Russell, LLP, moderator
Panel Participants:
Nuchine Nobari, Edwards Angell Palmer & Dodge, LLP, Librarian
Joan L. Axelroth, Axelroth and Associates, President
Anthony A. Licata, Dechert LLP, CFO

An interesting panel addressed the question of **To Recover or Not to Recover** for online legal research costs. Based on a survey conducted by the panel, several questions were posed to the panelists. The firms represented by the panel were definitely of the "recover" mindset, and revealed their methods and challenges. Having a CFO's view of the cost recovery process was very insightful and made the discussion thought provoking.

The first question posed by Ms. Mauldin was, "Is it ethical to charge for online legal research?"
Ms. Alexroth replied with an explanation of the ABA Ethics Opinion 1993-379 that specifies library expenses as overhead, but allows firms to bill for computer research - but the charge cannot exceed the direct cost of the service. However, associated expenses are allowed, such as paper, hardware, and the researcher, and can be added to the direct cost of computer research. The Ethics Opinion specifically prohibits a surcharge on third-party providers such as Westlaw and Lexis. If the firm receives a discount, it must pass that discount along to clients.

Mr. Licata explained the Dechert model as being very careful to take a loss on all online research billing, even to the extent of having refunded clients over a million dollars when online costs were reduced. The Dechert model applies a monthly "haircut" to online research costs before putting them on a bill. About 70% of Dechert's online legal research charges are recovered. An important issue stressed by Licata and the panel is to be able to explain the billing process to the client, and to show it as a pass-through cost, or a loss.

Alexroth noted a new trend from the recent survey indicating that only half of the firms recover 42% or more of their online charges. Last year the recovery was 60%. Another indicator of change was that 24% of the libraries surveyed were likely to stop recovering in the near future.

Mauldin asked, "Are services like RIA, CCH, and BNA recoverable?" Licata said yes, but Nobari noted that attorneys who use these services offer a lot of resistance if they are chargeable. They are especially resistant to using online research tools that are complicated.

Do firms follow up on non-billable research? According to the survey, 79% try to do a follow up. During the Q&A, Ruth Bridges pointed out that her cost recovery methods showed her added value by reducing firm write-offs, even though it required extra effort. Licata said the un-billable portion is applied to individual budgets, and will get more attention from practice areas as budgets tighten. Nobari's staff spends twelve hours per week with follow-ups which include helping attorneys to improve their research methods. Nobari is reducing Westlaw usage by 20%.

Do firms use Recovery tools such as Onelog, Research Monitor, and Lookup Precision, and do they help with recovery? Licata said it is used more for information than recovery. Alexroth pointed out that these tools help analyze costs and assist in collection development. Jean O'Grady of DLA Piper commented that the tracking tools are very useful for controlling non-billable research by blocking mysterious numbers. The tools also aided cost recovery because of the look-up client number feature attorneys could use. Ruth Bridges of Schiff Hardin in Chicago commented that the Cost Recovery tools were very useful for showing research strategy and search results, especially on Lexis and Westlaw, and that this information is very useful in helping attorneys improve research strategies and contain costs.

Are clients pulling back on paying for research? Licata said his firm is not in that position yet, but things are "going south." If it happens, the cost will be added to overhead, just like rent. Alexroth asked the unanswered question, "If research costs are applied to overhead, is it fair to clients who do not need research?" Another open question is how online legal research costs will be applied to the rate in alternative fee arrangements. Licata said it depends on the deal, and that the best practice is to get it spelled out in the engagement letter.

One of the most interesting comments about cost recovery was by a librarian from Fish & Richardson who successfully moved online legal research costs into the overhead model. He found increased productivity, increased efficiency, and other improvements by opening access to information. He also found greater utilization of resources stating that "making people afraid to use sources devalues them." A comment about the psychology of research was made by Greg Wine of Obermayer Rebmann, who pointed out that we are saying, "Here's a great tool, but don't use it!" because it's billable.

Are we taking these into consideration when discussing and implementing the Recovering or Not Recovering concept for online legal research costs? Let's hope there is time to continue this part of the discussion.

*This entire program was webcast and is available for viewing and downloading on AALL 2go.*

# DAMN LIES AND PATENT LAW STATISTICS: GETTING DATA TO IDENTIFY TRENDS IN PATENT LEGAL ACTIONS

reviewed by Amy Eaton, Perkins Coie LLP, Seattle, WA

This 30 minute PLL program quickly reviewed the fee-based and free resources we may consult to help us determine the best resources for reliable patent statistics. Amy Wisinski, of Winning the Case, sped through a number of resources which I will briefly summarize.

The USPTO has added a new Patent Dashboard to their statistical analysis page. This is visually appealing but summarizes only recent activity. The USPTO continues to offer statistical analysis based on calendar or fiscal year in html or pdf. The EPO provides patent filing statistics back to 2001 in a downloadable spreadsheet. WIPO also provides access to filing statistics such as the number of filings, granted, in force and intensity. The WIPO data is particularly dense and in some cases goes back as far as 1883.

The fee-based systems include West Monitor Suite and Innography. Both products integrate patent data with company information. Company statistics are also available from *IPO Today* and the *IP Today Corporate Parent Scorecard*.

Patent litigation statistics can be found from a list of products including PACER, the Administrative Office of the Courts, LegalMetric, Docket Navigator, Winning Case, West Monitor Suite, Lex Machina, Innography, and Paragraph Four. These tools help us answer questions about the judges, clients, litigants, etc. Although these tools are very helpful, they do have limitations. Data is rarely updated in real time and extensive analysis by the fee-based products can take time. Caveats include clerk errors, lag time, and the one nature of suit limitation.

International Trade Commission investigation statistics are available on the ITC website. Additionally, you may search use the advanced search feature to build your own statistics.

Law firm statistics may be built by consulting a number of resources including IP Law Today, Managing IP Annual Top 50 List, and IPLaw360. Law firm data available includes win/loss rates, number of trials, cases filed, and patents awarded.

I have to admit I was not familiar with all of these products prior to the presentation and promptly explored a few of them.

Links included in the presentation:

Free resources:
http://www.uspto.gov/dashboards/patents/main.dashxml
http://www.uspto.gov/patents/stats/index.jsp
http://www.epo.org/about-us/statistics.html
http://www.ipo.org/AM/Template.cfm?Section=Top_300_Patent_Owners
http://www.iptoday.com/issues/2011/07/corporate-patent-scorecard.asp
http://www.uscourts.gov/statistics.aspx
http://www.usitc.gov/press_room/337_stats.htm
https://edis.usitc.gov/edis3-external/app
http://www.aipla.org/learningcenter/library/books/econsurvey/Pages/default.aspx
http://www.iptoday.com/issues/2011/03/top-patent-firms.asp
http://www.patstats.org

Fee-based or subscription resources:
http://www.innography.com
http://west.thomson.com/products/services/monitor/suite/default.aspx
http://www.pacer.gov/cgi-bin/links.pl
http://www.legalmetric.com
https://docketnavigator.com/entry/home
https://lexmachina.com
http://www.winningcaseinc.com/
http://www.paragraphfour.com/
http://www.law360.com/ip
http://www.managingip.com/Article/2864492/Shaping-the-future-of-IP.html

# MINING THE DEPTHS OF SEC COMMENT LETTERS

reviewed by Michael B. Hoffman, Torys LLP, New York, NY

Presenter - Phil Brown-Intelligize, Inc

This short but informative program on a slightly esoteric but important component of U.S. Securities and Exchange Commission (SEC) review was presented by Phil Brown, formerly with LIVEDGAR, now with Intelligize.

First, Mr. Brown explained what SEC comment letters are and how they are part of the regulatory process. He explained how they became to be released and available for public searching. Originally the SEC did not release them, but in response to hundreds of FOIA requests, the SEC decided rather than answer all the requests, they would just release them. He went on to explain that there are comment letters issued by the SEC for 1933, 1934, and 1940 Act filings. The SEC issues a comment letter on a filing and the issuer usually responds. If the SEC is satisfied with the response, there is no further communication. The SEC releases both the comment letters and the issuer responses.

The letters are available on the SEC website and numerous pay services such as WESTLAW Business, Intelligize, LEXIS and WESTLAW. Detailed searching of the letters is available on the pay services.

This program was geared towards novices in this area and I feel it succeeded. For those who are experienced in using and searching comment letters, there was nothing really new.

# THE SUPERSIZED FIRM: TRANSATLANTIC LAW FIRMS

reviewed by Susan M. Yancey, Vinson & Elkins LLP, Houston, TX

Ronda Fisch, Director of Research at Reed Smith LLP, coordinated a Sunday afternoon program which attracted library directors, managers, and supervisors. Focusing on the globalization and consolidation of large law firms, “supersized firms” can have more than 3,000 lawyers. The panel discussion outlined integration issues with an emphasis on the international component.

Beginning with the statement that “No two mergers are the same,” Ronda referred the audience to Law360’s Global 20 – all of which grew through a series of aggressive mergers. (see “*Law360 Global 20 Firms Blaze Trails Abroad*,” Law360.com, May 13, 2011). The firms are following clients in these mergers. Some are “alliances.”

Hildebrandt’s Marianne Purzycki reviewed law firm merger trends. U.S. mergers slowed in 2010 (only 27) but 2011 has seen an uptick with 22 completed mergers in the first half of 2011. In the U.S., the mergers mainly involve smaller firms but megamergers are also in the numbers. Ms. Purzycki pointed out that U.S. based mergers usually have destinations in the U.K., Australia, and Canada but said to watch for the Asian-Pacific region, especially Australia’s western part as it is resource rich. She expects more activity in alliances. Since firms are constantly re-evaluating their strategies, she predicts a big rebound in mergers. In 2010 there were eleven cross-border mergers with greater interest in the combination of a U.S. and a U.K. firm. So far there have been 13 cross border mergers in 2011. The largest U.S./U.K. merger since 2000 was U.S. firm Hogan and Hartson (1,100 lawyers) with the U.K. firm of Lovells (1,400) in 2010. Hogan Lovells’ (2,363 lawyers) has 43 offices and is ranked 5th in the AmLaw 100.

Ronda described her firm, Reed Smith, as a firm which started merging in the 1970s. There are now 1,647 lawyers in 23 offices. The largest office is in London. She described mergers for the library as sailing the “7 Cs”: challenges, change, cultural, communications, checklists (see handout at AALL2go), contracts, and collections. She advises librarians not to panic - to be reassuring, positive, and helpful during a merger and to continue to provide services and uninterrupted access to documents and resources.

Reed Smith had differences of language to resolve. For example, the term “Technical Services” is non-existent in U.K. job titles. Charging time was a big issue since it had only been three or four years since the U.K. offices had charged researchers’ time. And there were different accounting systems and accounting periods, different policies of invoicing to resolve, etc. In departmental management and structure there were mission statements and strategic plans to merge, reporting responsibilities to work out, and staffing ratios to agree upon. A merger is an opportunity to change things that are not working. Regarding contracts and licensing, Kay Hart advised that “the T’s and C’s are important” premerger. Postmerger there are a myriad of issues to prioritize and negotiate as IP addresses, physical locations, routing lists, and services are updated.

The Supersized session was interesting and informative to those who may be anticipating a merger in their future.

# PARTNERING WITH MEMBERSHIP LIBRARIES FOR COST-SHARING AND JUST-IN-TIME ACCESS TO INFORMATION RESOURCES

reviewed by Randall J. Thompson, University of Arkansas, Fayetteville, AR

With all the history that abounds in Philadelphia, it is appropriate that membership libraries were the topic of a program during the AALL conference. Membership libraries, in which access is limited to those individuals and organizations that purchase membership in the library, represent one of the oldest library organizational structures in the country. While the membership library has its roots in history, this program posited that its time has returned.

The program was coordinated by Ralph Monaco, director of the New York Law Institute. He was accompanied by panelists Mikhail Koulikov, also of the New York Law Institute, and Regina Smith of the Jenkins Law Library. They were joined by PLL Chair Steven Lastres, director at Debevoise and Plimpton, who gave a perspective of membership libraries from the user's viewpoint.

The primary benefit offered by membership libraries to their clientele is access to necessary information with reduced end-user staffing. By essentially outsourcing reference work to a membership library, firms can meet their workflow demands within the personnel framework established by the firms' budgetary concerns. This is obviously a cost saving measure for the member library and still guarantees that the end-user gets the information which is needed.

However, a note of caution should be added that before outsourcing research to a membership library, firm librarians should look carefully at their operations and determine whether reference work is a core function of their organization. Only then can they decide if that function is something they can turn over to others or if it is too integral to what they do to pass it on, regardless of the savings that might result.

But membership libraries provide other benefits as well. The fact that information is available through an outside organization facilitates firm libraries in moving from a service model which focuses on ownership to one based on access. This means libraries can forego the costs of staffing, space, and acquisitions associated with holding materials "just in case" they're ever needed and instead concentrate on providing information when needed "just in time."

Some specific services that membership libraries can provide include consortium style access to databases and catalogs. In addition, membership libraries can provide interlibrary loan services on behalf of the members and may provide continuing legal education to firms. Discounts on services may be offered for firms of 50 or more attorneys.

One issue the panelists stressed was confidentiality. Membership libraries operate, in many ways, as extensions of the firm and they stress to their researchers the necessity for confidentiality. As was pointed out, membership libraries have a tradition of confidentiality extending for 200 years so they are well versed in the concept and its application.

I came away from the program convinced that membership libraries do offer a viable alternative model for firm libraries seeking to ensure information access while dealing with, at best, stagnant staffing and resource levels. While I would need questions answered about the cost and potential conflicts of interest, these do not seem to be insurmountable. As a means to guarantee service while protecting the bottom line, membership libraries deserve serious consideration.

# THROUGH THE LOOKING GLASS: HARNESSING TECHNOLOGY IN TODAY'S LAW FIRM LIBRARY

reviewed by Julia R. Berry, Alston & Bird LLP, Atlanta, GA

Michael Saint-Onge, Team Lead & Senior Library Relations Consultant, Lexis/Nexis
Greg Lambert, Library & Records Manager, King & Spalding

Greg and Michael provided a fast-paced and highly entertaining snapshot of technology applicable in and out of libraries, scrolling through their nearly sixty slides in the allotted sixty minutes. This summary covers some of the highlights since the presentation is available at https://docs.google.com/present/view?id=0AcBSC1okpVKCZDZrazZ6cF80NzMza2o0dmRocw&hl=en_US. Be sure to read the captions at the bottom of the Power Point screens.

**Devices:**

Philips' PicoPix was offered as a handy training tool. It is a palm-sized projector that can connect to your computer or mobile device, but since it has an SD slot, you can also just carry your presentation in your pocket. Imagine running a spontaneous meeting without calling IT to bring a projector to the conference room.

The Mozilla Seabird 2d concept phone also garnered lots of post-session chatter. It contains two projectors, one of which projects a display onto a wall or screen, the other of which projects a keyboard onto a flat surface for typing. It has a mini-USB port, its headset doubles as a mouse, it has an 8MG camera and it has Bluetooth and Wi/Fi. The consensus is that if they built it, we will buy.

**Applications:**

SnagIt captures lines of text or screenshots; you can even grab scrolling windows, which is an improvement over the Windows Snipping Tool. SnagIt also lets you build short videos, which could be used for training. It is free for 30 days, and costs $49.95 thereafter.
iAnnotate PDF does what is says, allowing you to insert highlighting, comments, and bookmarks in PDFs. At $9.99, it is a bargain.

PROXY Pro 7 allows you to connect to another's computer and display your screen or view theirs, like pcAnywhere. TeamViewer also allows you to connect to PCs and is free for personal use.

In the url shortener realm, bitly allows you to track clickthroughs (to see if anyone is actually using the training materials you send). Snip.ly lets you highlight sections of a website, and retains your edits when the recipient clicks on the new url.

Numara Track-It! provides reference request tracking, including time to resolution, and is searchable. It even compiles your stats for you, which may be a reason on its own to buy it.

Fastcase lets you research from your iPad, offering cases, statutes and regulations for free. CasemakerElite offers similar content and is in the process of implementing a simple search format similar to WestlawNext. It may be free through your local bar association, so check.

DOJ.me lets you check the status of any website from your desk, so you know whether to call your Help Desk or just click refresh periodically.

ChangeDetection is a free site that monitors changes to web pages. You just type the url and the e-mail address where you want the notice sent. You see a redlined version of the modified web site.

For you *Getting Things Done* devotees, Remember the Milk keeps track of your tasks and reminds you of those things you still need to do. It lets you sort tasks into personal and work. It's free and has an iPhone app. It takes all of five seconds to sign up.

# NO MORE SHUSHING: MAKE SOME STRATEGIC NOISE ABOUT YOUR LIBRARY

reviewed by Shari B. Berkowitz, Reed Smith LLP, Philadelphia, PA

With the economic climate continuing to be tenuous, we are all searching for new ways to make our presence known in the larger organizations where we work – The Firm (feel free to cue the chase-scene music!) The standing room only crowd for this Sunday afternoon PLL Program attests to this new reality. As stated at the outset of the session by moderator and panelist Steven Lastres, in many cases the professionals we work with at the firms still don't know who we are, what we do, and the value we bring to our firms.

The agenda for the hour-long session was broken down into four primary areas of focus:

- Branding and Messaging
- Strategic Planning, Annual Reports, and Mission Statement
- Strategic Services
- Cost Recovery and Key Metrics

Branding and Messaging was covered by panelist Angela Stemlar, Director of Research & Library Services at Goodwin Proctor. A good brand can be the difference. She said just consider companies like Nike, Facebook, Google – we'd know their logos anywhere. As soon as you hear the company name, immediately certain images and perceptions come to mind. It's all about the reputation and relationships built with their clients. It's no different in a law firm setting, according to Stemlar.

To illustrate the process of how a firm library went about making more noise about who they are, Stemlar used the real-life example of what the Goodwin Proctor Library team considered when looking to "remake" itself. The first step they took was to ask themselves these four questions:

1. What are our pain points and the problems of our clients? And when was the last time we asked?
2. How can our libraries solve these problems?
3. How do we want to be seen? Are we collaborators or gatekeepers?
4. Who are our competitors in the marketplace, in the organization?

Along with considering the answers to these questions, the Library tried to articulate who they are and what they wanted to be going forward within the firm. Some of the notions that came from this included being experts in research and information delivery, being collaborative and solution oriented, wanting to be #1 in customer service at Goodwin Proctor, and to be part of the team. They also decided that as the experts, they wanted to be part of the discussion and "at the table" on projects or administrative issues that called for any research.

The next logical step was to take a long, hard look at the department's name and logo. The original name of "Information Resources" was found to be confusing to both internal patrons and outside vendors. Therefore, after going through some of the exercises discussed above, they renamed their department "Research and Library Services". To the Goodwin Proctor Library team, this new name denoted the services that they provide to the firm personnel, and it was also terminology with which their patrons seemed comfortable. In addition to renaming their department, they decided to create a recognizable logo that would make people instantly know this is from the Library and it's worth a look. The department eventually decided on the color green to represent them and incorporated books and tag lines into their logo.

Once the new logo and branding concept was set, it was time to implement it into the everyday operations. One of the key methods the Goodwin Proctor Library team utilized was targeted messaging via emails to practice groups. This was echoed by the other two panelists, Steven Lastres and Jean O'Grady, the Director of Research Services at DLA Piper. After initial concerns that this type of regular marketing or newsletter alert by the Library would not be welcomed by many of the attorneys at Piper, Jean said the Library received great feedback and now gets regular inquiries on the resources and other tips included in their weekly newsletter. At Debevoise, Steve takes the logo and branding concept and incorporates it into the Ozmosys emails. The Library at Debevoise also includes the names and hours of the Librarians and links to various resources in many of their alerts and emails.

Steve and Jean then shifted the focus of the session towards using the numbers as part of the bigger picture. As with many administrative departments within law firms these days, the Library is also being asked to cut back expenses in areas such as staffing and print/electronic subscriptions. We have been expected to become more creative and innovative with how to provide the same level of service despite these cutbacks. So how we can market our value to the firm and maybe regain some of what we've lost? Steve says one way to do this is to prepare and submit an Annual Report to the firm's senior management. He had several tips for preparing a worthwhile report including:

*Continued on page 11*

No More Shushing, *continued from page 10*

- Complete it within three months of the new year
- Good length is about twelve pages
- Include an executive summary and a long-term strategic plan (3-5 yrs) which shows an understanding of the market, the firm, planned initiatives for training and resources, etc.
- Be sure to include metrics such as cost recovery, number of requests, etc.
- Include attorney and other personnel comments regarding the services they've received.

These annual reports can be an invaluable tool for Library Directors and Managers to justify hiring additional personnel or to request an increase in budgets for resources and materials. It is imperative that in today's economic climate, we can demonstrate through concrete data how we add value to the firm and to clients by keeping the research with the experts (that's us!).

Steve also discussed how firm libraries can strategically promote themselves and their services on a more daily basis. Along with the targeted messages and the use of branding/logos in items such as Ozmosys emails, we should think about our intranet presence. Are we promoting our services and maximizing our visibility, or are we buried several pages deep on the firm's intranet? Is it easy for the user to find what they need or to get started? Should we have Library team members dedicated or "embedded" to specific groups and tasks?

Intertwined with strategic planning and promoting our services, Jean focused on the importance of cost recovery for firm Libraries today. Many clients don't want to pay for online research, but yet with shrinking print collections, in many cases this is the primary method for conducting research. This is a perfect opportunity to again promote ourselves as the research experts. But that doesn't mean we still won't need to focus on cost-effective training of attorneys on electronic resources such as Lexis and Westlaw in order to reign in unnecessary costs and maximize the return/minimize the effort of the cost recovery process. Of course going about this will vary – a small firm may design a very different plan of action than a large, international firm. In the larger firms, there are the added considerations of varying office cultures towards Library services and research, plus if there is no Library team member in an office it can be more difficult to monitor the habits and actions of the attorneys. However, we cannot give up. If we can demonstrate an increase in firm revenues because clients are willing to pay for research being done more efficiently while lawyers can concentrate on the bigger picture, then we become a more valuable asset to the firm.

As the hour had passed so quickly, I can only imagine the questions and comments could have extended this session for another hour. What I think we can take away from the popularity of this program is that firm libraries are facing a fork in the road and we need to decide how best to proceed and to navigate the twists and turns along the way. To some extent, we are all in the same boat regardless of our size. I would even submit that this program could apply to most other libraries today – we are faced with reduced budgets and staffing but yet want and need to maintain the highest level of customer service for our patrons. In the world of today, where we are moving at the speed of microseconds, we need to always be thinking at least two steps ahead.

Two recently launched blogs provide a wonderful way for Librarians to collaborate and help each other around the world:

http://deweybstrategic.blogspot.com (started by panelist Jean O'Grady)

http://www.firmerground.com (joint effort between AALL PLL-SIS, SLA Legal Division, Canadian Association of Law Libraries, and the British & Irish Association of Law Librarians)

We cannot be quiet anymore…we are libraries of the 21st century. Be loud, be proud!

# SEARCHING FOR AND LOCATING SCIENTIFIC LITERATURE: FINDING A NEEDLE IN THE HAYSTACK

reviewed by Roseanne M. Shea, Wachtell, Lipton, Rosen & Katz, New York, NY

Emily Florio, Fish & Richardson
Richard A. Matula, Kenyon & Kenyon
Ruth Wolfish, IEEE

The first speaker, Richard Matula, presented three typical research questions for the audience and then dissected each one, highlighting the important phrases. He discussed some of the pitfalls to be aware of when searching scientific databases. When you are dealing with chemical compounds, be wary of alternate spellings. The name can be written as one word, as a phrase, or hyphenated. You can often find synonyms by doing a preliminary search in a database such as Chemsearch from the American Chemical Society, or you can get MeSH terms (Medical Subject Headings) from PubMed.

The approach to answering each science related question is the same as for any other discipline. Understand the question and the terms being used. A simple Google search can sometimes give you needed additional information or you may need to conduct a reference interview. A Google search may bring up an answer or lead you to a free site that has the information you need. The subscription resources cited by the speakers included Medline, Embase, BIOSIS, CHEMSEARCH, CINAHL, Inspec from IET, and SciSearch. Most of these are available through vendors such as Proquest's Dialog, EBSCO, or STN. You may also be able to get access through an academic institution or large public library. You can search IEEE (Institute of Electrical and Electronics Engineers) literature for free at their website, Xplore Digital Library, and get an overview of the material available on your topic. You can purchase full text documents at the web site.

In evaluating electronic scientific databases, one needs to check the usual items – coverage and cost, plus a few unique requirements. Investigate the command line searching features – flexibility for in-depth searching is a necessary feature. Are corrections to articles appended? Some vendors delete original material when updated copies are received. It's often vital to know when the article was first published – can this be determined easily? Is a search history generated, and to what level of detail? If needed, is a charge back system easily implemented? Meaningful usage statistics can aid in your continuing evaluation of the product - can you get them easily?

The next part of the presentation centered on sources for scientific literature. A mix of vendor types was mentioned. Document retrieval companies – Research Solutions, Infotrieve and Reprints Desk, and academic sources – the Universities of Wisconsin, Michigan, Minnesota, Virginia Tech, and Linda Hall Library in Kansas City were recommended. For foreign materials, TIB Hannover is a good source for German materials. The British Library and NRC-CISTI, the Canada Institute for Science and Technical Information, are other valuable resources.

Even with access to the subscription databases and established relationships with document retrieval vendors, it sometimes comes down to throwing yourself at the mercy of fellow professionals. The various library association listservs can be life savers for those seemingly impossible requests. The PLL IP/PIUG group members have posted lists of vendor resources and other helpful material at their PLL website, http://www.aallnet.org/sis/pllsis/Groups/ip.asp and are a great resource for scientific searching know-how.

Overall this presentation gave a basic overview of how to proceed when looking for scientific materials. The handout had minimal information on the sources mentioned, but there is more material on the IP/PIUG web pages to add to what was discussed during the session.

# TEACHING ADVANCED GOOGLE

reviewed by Laurie A. Claywell, Kaufman & Canoles, P.C., Norfolk, VA

Don MacLeod, manager of knowledge management at Debevoise & Plimpton, pointed out at the beginning of the sitting-in-the-aisle room only PLL-SIS program **Teaching Advanced Google** that our patrons are going to use Google so we might as well help them to get the most from it. I confess I felt a little better hearing him say that out loud since I had come to the same what I thought of as defeated conclusion about a year ago. (The words "really…*really?"* are frequently poised on my lips when someone says "Ok, I've checked Google but not sure where to look next.") Don is right. They're going to use it so let's help them to ask a better question. Basic Google is good but Advanced Search gives a shorter list with more relevant hits.

To find Advanced Search, click on the Options gear icon in upper right corner, then click on Advanced Search. Don referred us to the Advanced Search tips available as a link on this page (upper right corner).

The syntax tools and filters are great options for forcing and eliminating search terms. A user can take advantage of the Advanced Search template or, alternatively, just memorize the syntax tools, i.e., + [search for the literal term], - [eliminate term from the search] , ~ [employ synonyms; our speaker didn't see a lot of need for more search terms but I can see where it would be useful for things like cellular/wireless/mobile or property/land/real estate], and, lastly, site: [site search](my favorite, too, Don!). A site search allows you to target a specific web site. It's a good way to dig down on a specific site or to pick up on items that don't get hits using a site's sometimes less than adequate search feature.

Other very useful features are the built-in reference tools [what time is it in "x"; currency converter; calculator (5*9) +3]. The complete list of tools is on the Advanced Search tips page - click on "special search features."

Another useful tool was actually pointed out by someone in the audience. He advised us that neutral results can be obtained by inserting Pws=0& after the question mark in the Google search results string. From what I have heard, it may not work with Google Instant so you may want to consider turning off Instant if you want neutralized results. Another option for turning on and off personalized search:

1. Log out if you are logged into a Google account. It should simply say Sign In with no mention of your name in the upper right hand corner.
2. Click on the gear icon on a search results page and select Web History. [the Web History choice seems to appear only on the results page, not the Google home page]
3. Select "Disable customizations based on Web History."

I think the frequent excited murmuring of "Oh!" and subsequent furious scribbling from those around me during this program is what gave me the greatest insight: what we may take for granted may be new to others. I was reminded to not assume my users know about these tools. Posting tips on the library's intranet page isn't enough – hence the need for this PLL SIS program. We need to teach sessions on using Google effectively – 'cause they're going to use it. Really.

# MEETING EMPLOYERS' EXPECTATIONS: ARE LIBRARY SCHOOLS DOING EVERYTHING THEY CAN?

reviewed by Lori Hedstrom, Thomson Reuters, Eagan, MN

*Panel members:*
**Penny Hazelton** - Associate Dean for Library & Computing Services, Professor of Law, University of Washington School of Law
**Bacilio Mendez II** – recent graduate, Pratt Institute School of Library & Information Science; currently enrolled in the JD program at New York Law School; Diversity Chair, SLA Legal Division; GLBT Committee
**Dana Neacsu** – Instructor, Pratt Institute School of Library & Information Science; Librarian & Lecturer at Columbia Law School
**Patricia Barbone** - Director of Library Services at Hughes Hubbard & Reed LLP, where she hires entry-level reference librarians

The panel began with an overview of the legal marketplace, which has experienced massive downsizing since 2008. Some people who lost their jobs had inadequate or outdated skills and some had skills that had been replaced by current technology. The speakers' goal was to uncover what skills and knowledge are at the core of law librarianship in the digital global market, and how library school (LIS) curricula can best respond to these new market needs.

**Penny Hazelton** began with the premise that LIS curricula should enable students to acquire *skills* such as knowledge of legal research tools, emerging technologies, and collaborative innovation. But equally important are individual students' personal *attributes*: the current climate and the future will require law librarians to be flexible and adaptable, service oriented, willing to take risks, lifelong learners, and empathetic to patrons. The success of new research tools by many vendors is very attractive to the current generation of students, of which educators need to be aware. A distinction in goals has emerged: librarians like to *search* – we enjoy "the hunt!" We like that we can use our curiosity, intellect, and decision-making skills. Everybody else likes to *find!* In Penny's opinion, there is a distinction between loving technology and being able to apply it to research to make a patron more effective. This concept needs to be ingrained in LIS students.

**Dana Neacsu** sees "the library" as part of something larger, reflected in the Dean's philosophy for Pratt Institute School of Library and Information Science. There are global digital contexts across libraries, archives, and museums. What makes an excellent law librarian is not necessarily a J.D. degree; candidates need to be well-rounded and have a global perspective as to business and cultures as well as knowing the specifics of our own profession. At Pratt, the World Information Society and Environments (WISE) program encourages students to become conversant in business, government, law, policy, politics, and health information. There are relationships and implications involved in communication and information sharing across boundaries. Everything is interdisciplinary now – for example, a researcher needs to be aware that the Code of Federal Regulations has economic and other implications, as well as working with the text of a given section.

A 2010 graduate from Pratt, **Basilio Mendez** entered the program with a liberal arts degree (dance major), and got a job writing for a magazine. He believes that LIS programs are not preparing students for the "real world." When he was enrolled, he thought that the master's degree would be the magic entrée to a job in the New York Public Library's Performing Arts collection. He did not receive much guidance as to possible careers; the emphasis was on being a school librarian or "something else." He admits there was failure on both sides in his case – the program was "all about networking" but that didn't work for him. Instead he read listservs and job descriptions, and learned the skills they wanted that he didn't have. In his opinion, the educational emphasis is on finding the answer, but not cultivating the curiosity and skills needed on the job.

From an employer's perspective, **Patricia Barbone** stated that networking *is* important for students. Speaking to practicing librarians in real jobs will give students information and resources not covered in school. Currently firms are focusing on KM, electronic discovery, digitization, and competitive intelligence and analysis, so LIS programs need to make students aware of these emerging areas of responsibility for law librarians. Emphasis on learning technology is clearly necessary, but technology information should be applied specifically to the legal work environment. Patricia would like to see law librarianship educators partner with organizations like ILTA (the International Legal Technology Association); the legal industry is still losing jobs, but graduates need to know where jobs *do* exist in the field.

A general discussion ensued with participation from several members of the audience. A benefit in LIS education generally is that there are many models used to help prepare students for a career, including classroom instruction, online courses, and hybrids that contain elements of both. Internships are critical; Penny's students say this is the most valuable element of their educations. But employers need to step up and support internships, and LIS programs should work with them to streamline the process and overcome barriers. Whether or not students

*Continued on page 17*

# LEGAL EDUCATION FOR LAW PRACTICE: TEACHING LEGAL RESEARCH IN A PRACTICE ENVIRONMENT

reviewed by Amy Carr, Greenberg Traurig LLP, New York NY

Vicenç Feliú , University of the District of Columbia (UDC), David A. Clarke School of Law, Mason Law Library, Moderator
Helen Frazer, Brittany Kolonay, and Gail Mathapo of the Mason Law Library along with Kaitlin Banner and Laura Rinaldi of the David A. Clarke School of Law were the featured speakers.

The embedded librarian program at UDC seeks to place a librarian in each of the law school's clinical programs in order to teach legal research in a practice environment. The program began in the fall of 2010 with Helen Frazer's addition to the Juvenile and Special Education Law Clinic. In the spring of 2011, Gail Mathapo joined the Community Development Clinic and Brittany Kolonay was placed in a clinic focused on criminal, social, and community justice. Librarians and law school faculty plan to expand the program by adding one to two librarians each year until all eight clinics have an embedded librarian.

The program is designed to assist the students in conducting advanced legal research. While this work is required in the clinics, the students found it difficult and were often unprepared. The clinicians realized that although they are subject matter experts, they are not research experts. The librarians are able to provide instruction and review how to start a project in an unfamiliar field. They model expert research behavior, provide feedback and coaching, and help students develop a research plan and resource map for their projects.

The clinical program is composed of coursework, research work, and case work. Librarians found it helpful to attend the courses so they could familiarize themselves with the subject areas. In each of the three clinics profiled, the librarians conducted at least one research presentation. In two of the clinics, the students were required to have at least one meeting with the librarian during the semester to discuss their research plan. In the Juvenile and Special Education Law Clinic, Helen Frazer attended one of the weekly tutorials held with individual students to discuss the research project. In all cases, the librarians were available on a consultation basis throughout the semester.

This program is still new so the UDC clinicians and librarians are learning as they go. Suggested improvements by the panelists include:

- Focus on fundamentals (e.g., secondary sources), create list of resources for students,
- Librarian attend more tutorial sessions,
- Create focused topics, projects, and deadlines,
- Clinicians and librarian discuss research project topics before students arrive, and
- Enforce requirements and create accountability on the part of students (through grades or greater supervision).

For those considering an embedded librarian approach, the panelists recognized the need to generate enthusiasm and buy-in for the program. They encouraged other librarians to consider how their expertise could support a clinical program without creating additional work for the faculty members. The time investment of the UDC librarians was not overwhelming. The panelists agreed they spent less than 10 hours per week in general, with more time required at the outset as expertise and an outline were developed. Librarians were often able to meet with students during reference desk shifts.

Although still experimental, all the panelists agreed the program has been a success. The UDC librarians are enjoying the process and feel they are a vital part of the students' education. They are all excited about continuing with the program and about its planned expansion.

While this presentation was from a law school perspective, it was not just about an academic environment but a concept - using librarians to provide education and guidance at the point of need. Embedding librarians in practice groups could provide great value to law firms where the return on investment could be demonstrated through faster turnaround, enhanced understanding of the needs of a particular group leading to focused purchasing of resources, and an increasingly proactive and collaborative approach to research projects.

# GETTING TO YES FOR YOUR LIBRARY

reviewed by Thea C. Warner, Niles Barton & Wilmer LLP, Baltimore, MD

"Getting to Yes for Your Library: Negotiating Vendor Contracts in Your Favor" was sponsored by the Private Law Libraries SIS and the Committee on Relations with Information Vendors. This session was coordinated by Jane R. Baugh, Director of Information Services at Woods Rogers PLC in Roanoke, Va. She authored an article by the same title that was published in the April 2011 issue of *AALL Spectrum*. Ms. Baugh opened the session with an overview of the two primary schools of thought on negotiation – principled negotiation and the "EASY" process. The assumption with principled negotiation is that all sides wish to collaborate (at least to a certain degree) and that all parties are striving for a win/win result. The underlying principle of the EASY process is that not everyone wishes to collaborate and that negotiations vary depending on the participants.

Ms. Baugh went on to outline actions that should be taken at all phases of the negotiation process. For a new contract, research on the product is essential. With an existing contract, prior usage and experiences, both with the product and with customer service, should all be taken into account. Her suggestions for the negotiation process itself include remaining aware of everything going on (including any changes in demeanor or tactics of the vendor), taking notes and making an effort to keep everyone on the same page. After negotiations, but prior to the contract signing, it is important for the team working with the vendor to take a step back and discuss the results. Walking away is always an option if the team is not satisfied with the outcome.

The panel, consisting of two attorneys involved with vendor contract negotiations for their firms (Clare D'Agostino, Morgan Lewis & Bockius LLP and Scott B. Schwartz, Cozen O'Connor) and two library directors (Connie Smith, Morgan Lewis & Bockius LLP and Loretta F. Orndorff, Cozen O'Connor) followed with a discussion of specifics of a vendor contract. Ms. D'Agostino discussed the basic parts or "nuts and bolts" of a contract. The organization name, all locations covered by the contract, effective and termination dates, payment terms, governing law clause (state law that will apply when something goes wrong), triggering event clause, and a section addressing other changes in circumstances are all essential components of a vendor contract. Definitions, acronyms, abbreviations, and file names should all be double-checked for accuracy. Ms. Smith added that we should be aware of new clauses addressing e-books and third-party consultants.

Mr. Schwartz and Ms. Orndorff discussed the "typical ingredients" of a vendor contract, including the master agreement, order form, pricing document, privacy statement, online terms and conditions, and non-disclosure agreements. They stressed the importance of knowing which document controls and having the right people involved with the review process, negotiations, and signing of the contract. Ms. Orndorff suggested that the payment terms be adjusted because the time period is typically very short. Ms. Smith offered some suggestions for librarians who do not have an attorney available to review the contract with them. Other departments that have contracts may be able to provide some assistance. Another option is to start by asking an attorney to review one clause of the contract.

Mr. Schwartz addressed click-through documents, such as individual user terms and conditions and privacy policies. It is important to determine whether these are contractual documents. Vendors should always provide a notification of any changes and allow reasonable time for customers to respond to these changes. It is also important to be aware of the use of "evergreen" language, particularly when automatic renewals are addressed. Indemnification and warranty language should always be reviewed by an attorney.

The program was concluded with a few questions from Ms. Baugh for the panel and questions from the audience. Since vendor contracts are becoming more and more complex, this was a very timely subject and it was addressed by a group of very knowledgeable attorneys and librarians. The panel even provided attendees with a bookmark entitled "Elements of Vendor Contracts that Make Librarians Crazy" to help them recall the main points of the session.

# AALL COMMITTEES: IS VOLUNTEERING IN YOUR FUTURE?

by Jean M. Wenger, AALL Vice President

I appreciated the opportunity to speak to members at the Annual Meeting PLL-SIS Business Meeting and Luncheon in Philadelphia. I wanted to stress the importance and value of PLL members volunteering for AALL committees and my plans to provide more information for members to make an informed decision. AALL committees offer choices for a variety of interests and schedules. Have you worked on a copyright issue at your firm? Do you handle training and CLE classes? Or, is giving away money and awards your cup of tea? There may be a committee appointment in your future.

Committees directly support the professional needs of your colleagues in the Association. Serving on an AALL committee can help expand your skills and knowledge base. Committees offer a forum to share your ideas and talents. On the lighter side, it is an opportunity to meet new colleagues from across the United States and around the globe.

As AALL Vice President, I encourage you to volunteer. Most importantly, the strength of the profession and the Association is rooted in the many and varied talents and perspectives that members from different types of libraries bring to the table. The Appointments Committee seeks the greatest diversity of members from the pool of volunteers. As part of this process, the committee seeks to balance each committee with members from different types of libraries including PLL members. Although the Appointments Committee would like to place all volunteers, it receives more applications than the number of committee slots available. The remaining names are retained for the year to fill committee vacancies and as a pool of candidates to serve on task forces and special committees.

Understanding that time is often the most valuable commodity for members, I am seeking to provide more information in the application materials about the "usual" time commitment involved for each committee. Some committee work is seasonal. Other committees have ongoing projects throughout the year. Often committees break down the work by sub-committee. As part of their responsibilities, committees develop new ideas or are asked to assist the Executive Board in fulfilling AALL's Strategic Directions through information gathering or project development. These additional activities can alter time commitments for members.

For the upcoming year, I plan to move the volunteer application timeline into the spring rather than the fall for many committees. This change will enable members appointed to a committee to begin their terms closer to their appointment time. Some committees, like the Annual Meeting Program Committee, will seek volunteers earlier than the spring. Please look for application information and deadlines in the AALL E-Newsletter and on AALLNET.

If you have any questions about AALL committees or the application process, please do not hesitate to contact me at jean.wenger@cookcountyil.gov. I look forward to working with many of you next year. Thank you for your commitment and support.

Meeting Employer Expectations, *continued from page 14*

may be paid, the organization's human resources standards for new hires, the great amount of time required by an administrator in the firm to oversee the student and create meaningful work for him or her to do, and evaluations are all issues that must be addressed. Perhaps LIS programs can help by providing standard language or toolkits to be used to encourage participation in internship programs.

There are also questions as to whether it is better for LIS programs to hire adjuncts or full-time professors. A benefit of adjuncts is to have currently practicing professionals in the classroom; however, professors foster and support scholarship in the field. In either model, instructors sometimes suspect that students know more about technology than they do. Rather than require a basic HTML course for everyone, students arriving with more advanced technology skills should be allowed a more customized approach. And there is a question of whether law librarians need to know even more than attorneys and law students do about legal research. They need a solid understanding of all the tools available plus the ability to teach others how to choose the right ones and use them effectively.

This accomplished panel brought many interesting insights to life with their own experiences and many audience members stayed to speak with them afterwards. Although there is no "one size fits all" education for future law librarians, there is great value in discussing the issues and possible alternatives for the varied and changing workplaces we all face regardless of where we are in our law librarian careers.

# PRIVATE LAW LIBRARIES SIS BUSINESS MEETING MINUTES July 24, 2011

prepared by Deborah Rusin, Katten Muchin Rosenman LLP, Chicago, IL
PLL Secretary

The meeting was called to order at 12:13 pm by Chair Jane Baugh.

Jane Baugh welcomed everyone to Philadelphia and the AALL annual meeting.

The meeting opened up with Jane Baugh acknowledging BNA the sponsor of the PLL-SIS luncheon. A motion to approve the 2010 minutes with no changes was then made and approved.

Treasurer, Margarita Bull then presented all in attendance with the Treasurer's Report.

Vice Chair, Steve Lastres who spearheaded the re-writing and re-working of the PLL Resource Guides took a moment to introduce and unveil the new PLL Resource Guides. A single hardcopy of each guide was available at each table for viewing and each member in attendance at the luncheon was given a flash drive, generously provided by BNA with each of the seven Resource Guides loaded onto it.

**PLL Programs at Philadelphia:**

A PLL program was presented during every track of the Annual Meeting this year!

**Recognition:**

Steve recognized PLL VIP Guest, John DiGilio, Chair of the SLA Legal Division.

Members of PLL-SIS who volunteered freely of their time over the course of the past year were publically thanked by having their name presented on a screen for all in attendance to see as well as receiving a personalized Certificate of Merit.

Recognition was give to outgoing Board members:
Joan Jarosek, Member-at-Large
Margarita Bull, Treasurer
Kate Martin, Past-Chair/Summit Committee Chair

New Board members were welcomed:
Scott Snipes, Member-at-Large
Elaine Knecht, Treasurer
Linda-Jean Schneider, Vice-Chair/Chair-Elect

**Highlights:**

The Knowledge Management Group was formed this past year and Martha Goldman led the way for the unveiling of a new PLL-SIS Strategic Plan.

The publication of PLL Perspectives was reduced to three (3) times a year.

Going forward, every PLL Subgroup will have Communities on websites and RSS Feeds.

The PLL Resource Guides will be living documents and will be able to be updated throughout the year by members.

The PLL-SIS will present webinars throughout the year.

The PLL-SIS will support PLL members on a path to AALL Leadership.

The PLL-SIS will work to increase PLL members' visibility throughout the legal community.

PLL University will allow for the posting of PLL programs on the PLL website.

**Awards:**

Six PLL-SIS travel grants were awarded this year to:
Linda Gray, Research Librarian, Nelson Mullins, Greenville, South Carolina
Kristina Lambright, Library Services Specialist, Vinson & Elkins, Houston, Texas
Grace Rosales, Research Librarian, DLA Piper, Los Angeles, California
Patricia Schminke, Law Librarian, Hunter Maclean, Savannah, Georgia
Rebecca Velez, Library Assistant, Ogletree Deakins Law Firm, Atlanta, Georgia
Lyn Warmath, Director Information Resources, Hirschler Fleischer, Richmond, Virginia

Five "Change as Action Summit," tuition grants were awarded this year to:
Patsy Bourke, Librarian, Middleton Reutlinger, Louisville, Kentucky
Crystal Sherman Norton, Director of Library Services, Riddell Williams, Seattle, Washington
Carolyn Scott, Librarian, Young, Moore, Henderson, Raleigh, North Carolinga
Rebecca Velez, Library Assistant, Ogletree Deakins Law Firm, Atlanta, Georgia
Lyn Warmath, Director of Information Resources, Hirschler Fleischer, Richmond, Virginia.

The very first PLL-SIS Emerging Leader Award was awarded to Cameron Gowan.

The Service to PLL Award was awarded to Joan Axelroth.

The vendors who provided support were thanked to include BNA for the PLL Lunch, Priory Solutions for the PLL Summit, BNA for the PLL Friday evening reception, and FastCase for the Hospitality Suite.

**Report on the Summit**

Steve Lastres then noted that this year's PLL-SIS Summit was a huge hit having been sold out!

*Continued on page 20*

# PRIVATE LAW LIBRARIES SIS EXECUTIVE BOARD MEETING MINUTES July 24, 2011

prepared by Deborah Rusin, Katten Muchin Rosenman LLP, Chicago, IL
PLL Secretary

PLL Chair Steve Lastres called the meeting to order at 5:34 pm

Present: Steve Lastres, Linda-Jean Schneider, Jane Baugh, Deborah Rusin, Margarita Bull, Elaine Knecht, Jennifer Berman, Joan Jarosek, Scott Snipes, Julie Pabarja, Randy Thompson, and Holly Riccio.

The 2010 Board Minutes were approved and passed.

**Treasurer's Report**

Margarita Bull gave the Treasurer's Report at the Business Meeting on Sunday, July 24, 2011.

**List of Assignments for Board Members**

Two spreadsheets were distributed to all in attendance. One spreadsheet listed the names of the various committees and subcommittees, with a brief description of the committee, responsibilities assigned to the committee as well as the number volunteers still needed to complete the committee roster.

The twelve (12) committees and subgroups are listed as follows:

1. Awards Committee
2. Bylaws Committee
3. Communication Committee
4. Education Committee
    Subgroups:
    a. Annual Meeting Programs
    b. Professional Development
    c. Summit
5. Grants Committee
6. Liaison Coordinator Committee
7. Media/Public Relations Committee
8. Membership Committee
9. Nominations Committee
10. Strategic Directions Committee
11. Groups Committee
    Subgroups:
    a. Competitive Intelligence
    b. Corporate
    c. Independents
    d. Intellectual Property
    e. Knowledge Management
    f. One-Person Libraries
    g. Records / Conflicts Management
    h. Technical Services
12. Liaison Committee
    Subgroups:
    a. American Bar Association
    b. ARMA
    c. Association of Legal Administrators
    d. ILTA
    e. LMA
    f. SLA Legal Division
    g. Vendors

**Review Strategic Directions Action Plans**
(See attached Committee Analysis Report)

PLL Bylaws Committee will create subgroups to review other Model Bylaws to suggest modifications, if any, to the PLL Board.

250 AALL members attended the PLL Summit. Current plan is to reach out to membership overall to see why PLL members did not attend the Summit.

Linda-Jean Schneider will reach out to AALL Headquarters to see if we can get a list of private law librarians who are AALL members but not members of PLL.

We would like to be able to reach to PLL members to find out what they would want to see in a 3rd Summit. We also do not want to repeat programs that were recently put on.

Julie Pabarja, who is currently an Ex-Officio member of the Annual Meeting Program Committee as well as Co-Chair of the PLL Annual Meeting Program Committee suggested that PLL submit programs that do not conflict with the AALL AMPC programs as one way of possibly getting more programs submitted.

Grants Committee is discussing the possibility of approaching AALL about possible new procedures for PLL to obtain AALL grants as the current practice seems cumbersome.

Holly Riccio will work with Linda-Jean Schneider to identify members who may be eligible to receive grants. Nominations Committee will work on drafting a description of each PLL Board post and the responsibilities affiliated with that post.

Interdisciplinary liaison coordinators, Scott Snipes and Camille Reynolds will work to make sure that chairs and co-chairs are fulfilling their responsibilities.

**PLL Web Site Redesign**

All SIS listservs are being turnoff on AALLNET as of July 31st. Going forward, AALLNET will just be a daily digest. While LinkedIn is a great place for daily digests, PLL will create a site separate from the AALL web site.

**PLL Resource Guides Blog and creation of blog space for Subgroups**

Word Press will be the platform for the new PLL Blog. Word Press is free, allows for blog posts to be followed up

*Continued on page 20*

PLL Business Meeting Minutes, *continued from page 18*

**Other Reports**

Jean Wenger, incoming Vice-President to AALL put out a call to PLL for volunteers. Jean further stated that the Appointments Committee will be meeting in January and will ask committees to submit guidelines as to the time commitment required for each committee. This will allow for members to better determine committees that they may wish to serve on.

**Guest Speaker**

Guest speaker, AJ Jacobs was a huge hit discussing his book "The Know-It-All: One Man's Humble Quest to Become the Smartest Person in the World," and referred to his publication as a love letter to information resources. Mr. Jacobs had brought copies of his book for give away at each table and was available to sign copies of his book after the meeting. His website can be found at: http://www.ajjacobs.com/content/home.asp

**Gavel passed**

The gavel was then transferred to Steve Lastres now Chair of the PLL SIS. Steve briefly discussed the new Strategic Plan which includes among other things a new public relations effort to include working with the PLL Publishing caucus, creation of the new PLL Resource Guides, and an unveiling of a new website entitled On Firmer Ground which consists of contributions by international library groups all under the umbrella of advocacy. As part of the Communication efforts under the new Strategic Plan, leaders would reach out to the library schools and its students. The new Strategic Plan also calls for a revitalized Leadership effort and asking the membership what programs they would like to see presented not only at the Annual Meetings but throughout the year.

Steve then thanked Jane Baugh for her year as PLL SIS president and gave a plaque of recognition. Meeting was adjourned at 12:57 pm.

PLL Executive Board Meeting Minutes, *continued from page 19*

with comments as well as allowing for streaming of RSS Feeds. Idea is that we will integrate Wikis/Blogs for formation of PLL University. All recorded PLL-SIS programs, including PLL Summit programs would be put onto PLL University, which in turn is going to reside on Word Press.
PLL-SIS will have a Public Relations / Marketing group separate from AALL, that can respond "press" regarding PLL.

**Establish Monthly Conference Call Schedule**
Second Thursday of the month at 2:00 p.m. EST
Meeting adjourned at 6:43 p.m.

# 2011 AALL SALARY SURVEY AVAILABLE THIS FALL

The AALL 2011 *Biennial Salary Survey and Organizational Characteristics* will be available to AALL members in mid-October.

This new edition is the only source for up-to-date information about salaries for law librarians and other law library employees who work in academic libraries; private firms and corporate libraries; and state, court, and county law libraries. The survey was carried out this summer in complete confidentiality by Association Research, Inc., a professional research firm in Rockville, Maryland, that works exclusively with nonprofit organizations.

Printed copies of the survey will be available for purchase and shipment in mid-October; $110 for AALL members and $175 for nonmembers (contact orders@aall.org). An online version of the survey results will be available to AALL members for free on the Members Only Section of AALLNET.

# PLL-SIS RECORDS/CONFLICTS MANAGEMENT GROUP

reported by Diane E. Gates, Latham & Watkins LLP, Los Angeles, CA

The Annual Business Meeting of the PLL-SIS Records/Conflicts Management Group was held in Philadelphia on July 26, 2011 at 7:00-8:45 a.m. Thirteen people attended the meeting, despite the early hour.

Business discussed at the meeting included a report on the PLL conference call prior to the annual meeting. The group discussed the Education Survey that will be on the PLL website, and that members want more niche topics such as records, and that we can think about doing some webinars.

A volunteer is needed to be a second liaison with ARMA, in addition to Steve Lastres, so we can better collaborate with ARMA on programs, etc. If you are interested, let us know.

**Goals and Program Plans**

Minutes were sent out following the meeting, and we will periodically submit information about the group to *Perspectives*.

Mary Koshollek went to the PLL Education Committee meeting and will propose some programs for the group. We would also like to coordinate web programs with other related groups. Topics brought up at the business meeting included:

- "So Now You're in Charge of Records"
- Electronic records
- Workflows
- File intake and release
- What does records add to the firm
- Partnering with records on retention research, etc.
- Ethics in client records issues, especially conflicts and a conflicts primer

Mary surveyed the group afterwards, which resulted in the following list:

**Proposed Program Topics that were picked by the Records/Conflicts SIS Members**

- So Now You are in Charge of Records: A Primer for the Newly Minted Records Director (Who Might Also be the Firm Librarian)
- Searching Beyond the Conflicts Database: An Update on Sources to Flesh Out a Conflicts Search

**Possible Summit programs:**

- Designing Workflows: Automating a Business Process
- Conflicts of Interest: A Primer on Ethics for Conflicts Staff

**Other recommendations included:**

- Streamlining New Business Intake Processes
- The International Issues of Conflict Checks - From Anti-Money Laundering and OFAC to Terrorist Watch Lists

**Listserv**

The group discussed the future of the listserv and agreed that we'd like to still have an open list, like we have now, after the AALL lists migrate to the new platform. It didn't sound like the new AALL listservs would be open; so the PLL Legalrec list will close on Friday, September 23rd, and we will use the LinkedIn lists instead, since those are open lists. Lee Nemchek has volunteered to continue working with the listserv for our group and migrate as well as manage it on the LinkedIn discussion list. A question came up about archives of the emails from the listserv after they migrate to the new platform, and we have asked to keep the archives of our list.

**PLL website revisions**

We discussed looking at the website to see if any revisions were needed, and it looks like only a few revisions are needed.

**Networking/Discussion Items**

The group discussed records and conflicts related issues, which is one goal of the group, and we had a good discussion and time for networking at the annual meeting. Discussion topics included:

- How many people in AALL also work in records?
- How can we ask questions of the group and share information?
- One member asked if any firms are pursuing paperless initiatives, and if so, how are they going about it. One firm had a scanning project and the group discussed the procedures and issues.
- Records software –
  - What software do you like, and which don't you like?
  - Is anyone thinking about switching vendors?
  - Does anyone else have a vendor which is going to continue to be supported, but won't have any more major upgrades? If so, what are your plans?
- Email and electronic document management
- Data intake and release
- Retention
  - Electronic documents
  - Other retention questions/issues
- Conflicts – discussed workflow
- Closing matters – how to get them closed

# KNOWLEDGE MANAGEMENT GROUP MEETING

reported by Janet McKinney, Shook, Hardy & Bacon L.L.P., Kansas City, MO

The KM Group that met during the conference acquired knowledge early on, and since we are good collaborators, I'll share it with all: Never try to conduct a meeting at a Center City Philadelphia pub on a Saturday evening when the Phillies game is on TV. Once we located an alternative restaurant that would accommodate a group without reservations, Co-Chair Julie Bozell suggested these meetings be called the annual PLL-KM Pub Crawl.

About ten law librarians interested in knowledge management enjoyed a variety of Chinese dishes and getting acquainted. The first KM-related subject to surface was SharePoint – who has it, how involved we are or aren't, and at what stage in the process we are. As we talked, we observed that it seems the larger the firm, the more difficult it is to accomplish goals and finish projects.

Julie shared her and Co-Chair Camille Reynolds' plans for the year: improve the web page, develop a wiki, work on a calendar, connect with other KM groups, continue having monthly group conference calls (good participation already), and work to get librarians more involved with KM in their organizations.

# TECHNICAL SERVICES GROUP MEETING

reported by Mary K. Dzurinko, MK Dzurinko Associates, Baltimore, MD

The PLL SIS Technical Services Group met on Tuesday, July 26, 2011 at the AALL Annual Meeting in Philadelphia. Attendees participated in an informal review of a wide range of topics. Discussions centered on the handling of electronic resources, package programs, e-book cataloging, RDA implementation, cataloging outsourcing, and cataloging workflow. The group stressed the need for the involvement of additional volunteers to work on TS Group programs.

A program on e-book cataloging is planned for the 2012 AALL Boston Conference.

Bess Reynolds, Technical Services Manager, Debevoise & Plimpton, is the incoming Chair of the Group.

# COMPETITIVE INTELLIGENCE GROUP MEETING

reported by Mark Gediman, Best Best & Krieger LLP, Riverside, CA and Kevin Miles, Fulbright & Jaworski, LLP, Dallas, TX

Welcome to the PLL-SIS Competitive Intelligence Group, co-chaired by Mark Gediman and Kevin Miles. We are planning a full year for you, but will need your continuing input and participation. At the AALL meeting, the attendees told us they want to know more about:

1. What is competitive intelligence?
2. What are best practices for CI?
3. How to write a CI report?
4. How to analyze CI?
5. How to get the most out of SEC documents?
6. How to uncover competitive intelligence about small clients?
7. What are librarians analyzing for competitive intelligence?
8. How are librarians analyzing competitive intelligence?
9. Which kinds of branding and reports do librarians favor?

As we write this article, we are planning to submit ten ideas for the 2012 AALL conference. If you have any suggestions for a workable program and are willing to participate in putting it together, please email either Mark Gediman at mark.gediman@bbklaw.com or Kevin Miles at kmiles@fulbright.com. You don't have to be an expert on the topic to be a coordinator, just a willingness to put together a good program will do. What topic(s) would you like to see covered?

The CI Group also plans to work closely with the CI Division of Special Libraries Association (SLA) to put together joint educational programs to share the different experiences of our members. This was a suggestion by Barbara Fullerton, the incoming Chair of the CI Division, which was heartily endorsed by both Kevin and Mark. We will be reaching out to you in the coming weeks to get your good ideas to help us strengthen this relationship.

Additionally, Barbara has suggested that we can create and share some joint resources, such as a CI 101 course or webinar, a CI Wiki, and by reaching out to those involved in meeting programs for the American Bar Association, Association of Legal Administrators, Legal Marketing Association, and various state bar associations. We think these are great ideas! Please let us know if you have any contacts with any of these groups.

Our group was formed to share ideas and compare notes from those of us in the trenches while at the same time creating a dynamic environment for people who are new to CI to learn and grow. But we need you to participate in order to achieve those goals. Let Kevin or Mark know how you would like to help.

For the next newsletter: Marketing to use the Library for CI. Look for our survey on the subject in September.

# PLL-SIS INTELLECTUAL PROPERTY GROUP PATENT VENDOR PANEL MEETING

reported by Kimberly Martin, Goodwin Procter LLP, Boston, MA

The PLL-SIS IP group held their annual patent vendor panel meeting on Sunday, July 25th at the Pennsylvania Conference Center at the AALL conference. Kristin Whitman was the moderator of the event and as always asked some very good questions of our vendor guests. The following people were on the panel representing their respective companies: Mike Hudelson, LexisNexis (TotalPatent); Miguel Iglesias, Questel (Orbit.com); John Zabilski , CAS (STN); Tim Campbell, Minesoft (PatBase); Bob Stewart, Thomson Reuters (Thomson Innovation); Ron Kaminecki, Dialog. The event was well attended and will continue to be held every year.

The following is a list of the questions asked and the responses by each of the vendors:

At the PIUG conference in May, we heard a prediction from one vendor that the employment of full time patent searchers might come to an end within the decade. Who will be the major audience for your product going forward? Will it be librarians and information professionals with an advanced skill set, or end users that only perform occasional research?

Lexis – Both end users and patent searchers

Questel – Both end users and patent searchers

CAS – Information Professionals and Patent examiners

Dialog – Platform command language will still be there for patent searchers and adding short text for new users

Thomson – Information Professionals and focusing on showing end users how to use platform

Minesoft – Information Professionals and collaboration and showing that it is an easy tool to use with no training

As more of the world's intellectual property offices are producing digital collections, and the volume of searchable data explodes, what steps are you taking to ensure data quality in your products?

Minesoft – Automated quality checking and reporting errors to INPADOC

Thomson – Human translations with samplings to check quality, indexing is both by hand and automated

Dialog – Linking company names to records, internal quality control, indexing, and correcting errors when clients call them in

CAS – Automated processing and correcting, produce the CA Plus database with manual quality control

Questel – Team that tests data for errors and re-indexing documents, added their own rules for families, and spellings of companies

Lexis – Over 100 authorities that are automated with human quality control of data

Do you have plans to add additional complementary non-patent collections? What are you doing to make vital connections between patent and other data sources (companies, news, literature, trademark, copyright, drugs/pharma, litigation, etc…)? Could you especially address the question of non-US litigation?

Lexis – Have added data from Elsevier Science, courtlink, gazettes, and Orange Book soon to be added

Questel – Will be loading Pascal and Inspec to Orbit. You can upload your own documents, Pacer is built in but there are no resources for international litigation

CAS – Has 100's of databases with non-patent literature including Pharmaceutical and IMS patents

Dialog – Offers many non-patent literature databases. International litigation is available in Innography but is not made available to law firms.

Thomson – Offers Inspec, Web of Science, business and news, does not have non-US litigation information

Minesoft – Will be adding Trademarks and the Orange book

There were several more questions from the audience that were answered by various members of the panel. After the session there was a reception sponsored by Thomson IP Solutions & William S. Hein & Co. Inc.

The Intellectual Property Group would like to thank Kristin and the panel participants for a very informative program.

# TREASURER'S REPORT

by Elaine Knecht, Hiscock & Barclay LLP, Buffalo, NY
PLL Treasurer

| | | April & May 2011 | Year to date as of 5/31/2011 |
|---|---|---|---|
| | Unrestricted Funds 10/1/10 | | $ 53,737.18 |
| | Restricted Funds 10/1/10 | | $ - |
| | | | |
| Revenues | | | |
| 3010 | Advertising | | |
| 3030 | Contributions | | |
| 3140 | Dues | $ 232.50 | |
| 3260 | Misc. Revenue | | |
| 3370 | Registrations (1) | | |
| 3480 | Royalties | | |
| 3500 | Misc. Sales | | |
| 3560 | Newsletter Subscriptions | | |
| 3570 | Workshop Registrations | | |
| | | | |
| | Total Revenues | $ 232.50 | $ 563.90 |
| | | | |
| Expenses | | | |
| 4020 | Accomodations | | |
| 4430 | Exhibit Expense | | |
| 4490 | Food & Beverage | | |
| 4530 | Awards | $ 886.79 | $ 8,869.79 |
| 4570 | Honoraria | | |
| 4720 | Misc. Expense (incl Ann Mtg AV) | $ 1,788.81 | $ 1,788.81 |
| 4740 | Supplies | | |
| 4860 | Postage/Freight | | |
| 4910 | Election Expenses | | |
| 4960 | Printing | | |
| 4990 | Brochures | | |
| 5010 | Newsletter Expenses | | |
| 5190 | Souvenirs/Giveaways | | |
| 5280 | Telephone | $ 41.04 | $ 98.82 |
| 5320 | Transportation | | |
| 5900 | Transfer to Other Funds | | |
| | | | |
| | Total Expenses | $ 2,716.64 | $ 2,774.42 |
| | | | |
| | Excess Revenues over Expenses | $ (2,484.14) | $ (2,210.52) |
| | | | |
| | Unrestricted Funds | | $ 51,526.66 |
| | Restricted Funds | | $ - |

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