

≡ PLL PERSPECTIVES

THE QUARTERLY OF THE PRIVATE LAW LIBRARIES SIS OF THE AMERICAN ASSOCIATION OF LAW LIBRARIES Volume 11 Issue 2

[WINTER 2000]

THE EVOLUTION OF PRIVATE LAW LIBRARIANS AS SMARTLY DRESSED TRAINERS

Marie G. Wallace,

Marian Gould Gallagher Distinguished Service Award Winner

Law librarians, like most professionals, have been responding to radical changes in their habitat for several decades. One challenge for private law librarians has been training. How did this human capital function unfold? When did they get into professional development?

THE 70s - BIRTH OF THE DIGITAL SPECIES

The 70s were the growth years for firm librarians as well as for law firms. A big issue was who in the firm should instruct the new associates on how to do legal research in a practice environment. It was a choice between a partner, who rarely did research anymore, or the librarian, who coached the associates every day. Gradually, librarians took the initiative, established credibility and pioneered in lawyer training. Most of the programs were successful because firm librarians clearly had research know-how.

This was also the period when Lexis, Westlaw®, Dialog®, and other information databases arrived on the scene. When looking back on the 70s, it is amusing to remember how many practicing attorneys resisted electronic sources. "Too expensive." "Don't have time to learn." New training issues were raised by the databases. Who should do the training on these new systems? Vendors or librarians? And when should training take place? In law school or on the job? When should researchers go online and when to the books? One thing there was no question about, the librarians were recognized as the experts in the emerging libraries without walls. Thus firm librarians entered the 80s well positioned for training and technology.

THE 80s - OUT OF THE BICKERING NEST

Electronic information grew and so did the professional development issues. Legal research instruction continued to be offered both in law school and in firms. Debates about who should do the training grew more vigorous. Vendors, firm librarians and academic librarians each had a

position. Fortunately, librarians began talking to vendors and to each other about instruction. Occasionally they talked to lawyers too, but generally they were not ripe on this issue.

One stream of discussion culminated in the Lexis-sponsored Graylyn Conferences on teaching legal research. These conferences were primarily for academic law librarians; but in 1989 several firm librarians, Barbara Geier, Tory Trotta and myself, were invited to speak and attend. This was a pivotal event in the history of teaching legal research. The three of us were impressed with the format and focus of the Graylyn Conference. We heard Bob Berring's call to arms, "If you don't do it [teach legal research] who will?," and we made a proposal to LEXIS-NEXIS to sponsor a similar conference for private law librarians. LEXIS-NEXIS had the foresight to see the need, and plans were made for the first conference to be held in the spring of 1990.

THE 90s - LOOK MOM, I CAN FLY - INFORMATION YET

The 1990 conference sponsored by LEXIS-NEXIS on teaching legal research was not yet called TRIPLL (Teaching Research in Private Law Libraries); it was called the Westfields Conference because of where it was held. It was a stimulating success and laid the foundation for what became the annual TRIPLL conferences. Ellen Callinan, librarian at Crowell and Moring in Washington, D.C., attended this conference and had the vision to see the need for a clearinghouse structure within AALL. The Research Instruction Caucus was born the following summer at AALL. Soon there were Bridging the Gap programs, joint ventures between law schools and firms, sharing of training resource materials and annotating the McCrate Report with core competencies. In the meantime, lawyers were exposed to more training because mandatory CLE programs were implemented in most states and some firms hired professional development directors. The stage was set for improved training and law librarians had an important role.

continued on page 5

PLL PERSPECTIVES

EDITOR

Jan Brown
 Montgomery, McCracken, Walker & Rhoads, LLP
 Philadelphia, PA (215) 772-7611
 gbrown@mmwr.com

ADVERTISING MANAGERS

Rachel Jones
 Dickstein, Shapiro, Morin & Oshinsky
 Washington, DC (202) 775-4777
 jonesr@dsmo.com

Ronda Fisch
 Reed Smith Shaw & McClay
 Pittsburgh, PA (412) 288-3377
 rwfisch@rsmm.com

CHAIR, NEWSLETTER ADVISORY COMMITTEE

Rachel Jones
 Dickstein, Shapiro, Morin & Oshinsky
 Washington, DC (202) 775-4777
 jonesr@dsmo.com

CHAIR

Kathie Jo Sullivan
 Downs Rachlin & Martin PLLC
 Burlington, VT
 (802) 863-2375
 ksullivan@drm.com

VICE-CHAIR

Ann Jeter
 Jackson & Walker LLP
 Dallas, TX
 (214) 953-6038
 ajeter@jw.com

PAST CHAIR

Glen Gustafson
 Milbank Tweed Hadley & McCloy
 Los Angeles, CA
 (213) 892-4441
 ggustafs@milbank.com

SECRETARY

Holly J. Mohler
 Long & Levit, LLP
 San Francisco, CA
 (415) 397-2222
 hmohler@longlevit.com

TREASURER

Lauri Flynn
 Bank of America
 San Francisco, CA
 (415) 622-9238
 lauri.flynn@bankofamerica.com

COMMITTEE

Lee R. Nemchek
 Morrison & Foerster
 Los Angeles, CA
 (213) 892-5359
 lnemchek@mofo.com

Joanne Dugan

Pierce Atwood
 Portland, ME
 (207) 791-1229
 jdugan@pierceanwood.com

PLL DEADLINES

Fall – August 15 Spring – January 15
 Winter – October 15 Summer – April 15

PLL Perspectives (ISSN: 1068 9346) is published quarterly for distribution to members of the Private Law Libraries Special Interest Section of AALL. ©2000 PLL. Reproduction in whole or in part without written permission is prohibited. Non-members may obtain single issues for \$10, or subscribe to the newsletter for \$35.00 per year. The PLL/SIS and the Editor do not assume responsibility for, nor endorse, the statements advanced by the contributors to or the advertisers in *PLL Perspectives*.

FEATURES

- LAWYERS ON THE MEDICAL INFORMATION SUPERHIGHWAY 7
by Victor Miller
- NEW TRAINING COLUMN 9
by Rachel Jones
- HAVING LUNCH ON COMMON GROUND: LEXIS, WESTLAW & THE HUNT FOR MORE EFFECTIVE TRAINING 10
by Susan Ryan
- TRAINING YOUR BOSSES 12
by Marylaine Block

COLUMNS

- THE EVOLUTION OF PRIVATE LAW LIBRARIANS AS SMARTLY DRESSED TRAINERS 1
by Marie G. Wallace
- FROM THE CHAIR 3
by Kathie J. Sullivan
- ELECTRONIC NEWSLETTERS OF NOTE 8
by Druet Cameron Klugh
- THE PUBLIC RELATIONS PROGRAM (OR LACK THEREOF) OF A SOLO LIBRARIAN 14
by Amy Eaton
- ALSO FROM THE CHAIR 14
by Kathie J. Sullivan
- ALA ACCEPTS RECORDS RETENTION PROGRAM 15

PLL NEWS

- CALLING ALL MULTITASKERS! 16
by Lee R. Nemchek

West Group is proud to support the AALL-PLL by laying out its quarterly newsletter, *PLL Perspectives*.



FROM THE CHAIR

by Kathie J. Sullivan,
Downs Rachlin & Martin, PLLC, Burlington, VT

What is a leader? Are leaders born or made? What if leaders had no followers? What are the qualities that make a good leader?

The current SIS Chairs, AALL President Margie Axtmann, Roger Parent and Martha Brown from the AALL staff, and others debated these questions in a leadership retreat in Oak Brook, Illinois in October. We wrestled with the definition of "leader," the functions of SISs in general, and what we hoped we could pass on to future Special Interest Section leaders. It was a productive weekend of creative discourse and activities led by Grace McCartland of Thunderbolt Thinking. I had been thinking about SIS leadership a lot before I attended the retreat, and I had some ideas validated by others and through our exercises.

We decided every single person has the potential to be a leader. The person who answers a listserv question has stepped forward and become a leader. The person who proposes a program for the Annual Meeting is certainly a leader. Neither had any special skills; they just stepped in and filled a need. To illustrate this idea, Grace asked for volunteers to step to the front of the room. No explanation, just "I need three volunteers." Three people stepped forward. They were leaders. They took a chance with no expectation of gain or reward. They didn't know what they would be asked to do. But they volunteered anyway; and by stepping forward, showed that they were willing to take on a task.

Grace then asked us to describe our own leadership style. I said I was a cheerleader. In addition, as I learned at an AMPLL program, I am the kind of leader who likes to work with a group and let the group take the credit for the accomplishment. Being a cheerleader is hard work; weekends with other leaders and peers spent discussing our mutual successes and problems are very helpful. They help all of us open our eyes, feel more effective, and become more energized about new initiatives and future tasks.

Some of the ideas we talked about at the retreat came to mind at a recent event where I had the pleasure of listening to Martha W. Barnett speak on women and leadership roles. Ms. Barnett is the President-Elect of the American Bar Association and is a model of leadership for all of us. She said we are all agents of change in our leadership roles and as such we influence the next generation. With leadership and position comes the obligation to reach out and make a difference and influence change. We accomplish these goals by mentoring, by being philanthropic and by using our power to make change. That is, we can use our power and leadership roles in a constructive and effective way to make change.

We see the power we have as a group whether we are lobbying Congress or attending an AALL General Business Meeting. We are leaders in our profession because we volunteer to mentor younger members of our SIS or we sign up for a committee. We are agents for change because we see how things could be made better, whether a legislative initiative, a salary evaluation or a relationship with a legal administrator. We are all leaders in some way, but we need to publicize and share our individual and group efforts so others can learn from our experiences.

So take a few moments to reflect on your own leadership activities, whether they are in the workplace, the SIS or the Association. Have you challenged yourself and shared the results of your knowledge? Have you stepped to the front of the room without knowing what you would be asked to do? Have you dared to speak your mind? Have you been a cheerleader?

And if you haven't stepped forward yet, what is stopping you? You'll be hearing a lot about leadership in the next few months and at the Annual Meeting in Philadelphia. Maybe it's time to think about where you fit in and how to share your skills and knowledge with the rest of your colleagues. You remember the childhood game of Simon Says, don't you? Maybe you should take one step forward and see what happens. Become an agent of change and join us at the front of the room. ■

NEWSFLASH

Lee Nemchek's proposal on Records Management was accepted for the annual meeting of the Association of Legal Administrators in Denver. It will be presented on May 10.

The Evolution of Private Law Librarians, continued from page 1

This was the age of proliferation of pathfinders, job aids, guides, cheat sheets and other mapping of information. The TRIPLL conferences oriented private law librarians toward better presentation and training skills. The conferences exposed them to a broader picture, training principles and other training professionals' outlooks. Firm librarians grew more confident in offering research instruction. They were more comfortable knowing that their instruction continued what was begun in law school. Adult learning principles, the professional development model used by professional trainers (needs assessment, objectives, design, delivery and evaluation) and the key differences between teaching knowledge about a subject and training to develop specific skills were discovered.

In the meantime, technology leveled the whole training playing field. Now not just the attorneys but the whole firm team, including support staff, required training on computers and information systems. Professionals began to cross-train and form learning communities with other disciplines. Learning resources developed for the entire legal community. A good example is LLRX, Law Library Resource Xchange (www.llrx.com). The practice of law became international, global and multi-disciplinary. Professional development directors in firms and corporate legal departments formed a professional development consortium. One firm librarian, Barbara Geier, morphed into a director of professional development for a corporate legal department. Lexis supplemented TRIPLL with a program for academics called TRIALL (Teaching Research in Academic Law Libraries). By 1999, private law librarians were well established as trainers, and newer librarians had many models and arenas from which to learn.

2000+ – TRANSCENDING TIME AND SPACE

Many challenges face trainers in the next decade. Training will converge with and be built into information systems to be accessed at the point of need. There will be fewer fixed classroom settings as learners are more geographically dispersed. Training will be designed as a continuum and in cyber-space rather than real space:

- Via the Internet (e-mail, discussion groups, tutorials)
- Via the World Wide Web (hypermedia: text, voice, video clip)
- Electronic performance support systems available on the job.

More law librarians will move beyond legal research topics for training, especially technology-related ones:

- Internet research
- Intranet and extranet design
- Knowledge management
- Web page design and maintenance
- Search engine evaluation

Training programs will cover more soft and non-law topics:

- Business intelligence
- Marketing skills
- Managing change
- Organizational learning
- Leadership
- Team building

Programs will be designed collaboratively by teams within organizations. Delivery will be in multi-media formats and designed for global audiences. Anticipate aligning and merging topics, such as knowledge management, performance support and online learning.

Expect to bring the training to the learner rather than bring the learner to the training. For instance, the British government has plans to improve workers' literacy by offering reading classes in pubs, cafes and clubs.

Anticipate more free agent learners who are well educated, highly motivated and sophisticated. They take responsibility for their own ongoing learning and development as opposed to relying on someone else or internal trainers to provide it.

Perhaps most exciting of all is something the Massachusetts Institute of Technology is working on—"clothing that will think, talk and transmit vital information" according to writer Elizabeth Mehren in the *Los Angeles Times* magazine on August 22, 1999. Garments are called "wearable intelligence" with the communications wired and woven into the fabric fibers. What possibilities for training! The baseball cap functioning as an educational agent providing on-the-spot simulations. Trainers speaking into their cuffs to learners rather than off the cuff in response to their questions. "Dressing smartly" becomes jargon for professional development in progress.

For unwired trainers or those who have to function au naturel (in a low-tech environment), some issues are universal. Learners will still:

- Learn from peers
- Instinctively create learning communities
- Demonstrate a variety of learning styles
- Be motivated to learn what they need to know now
- Want to share what they already know
- Learn by doing
- Absorb values and attitudes by observation and interaction
- Profit from having a mentor ■

LAWYERS ON THE MEDICAL INFORMATION SUPERHIGHWAY

by Victor Miller, Center for Research Information,
Silver Spring, Maryland

Astute lawyers recognize that the ability to maneuver their way along the information superhighway is a vital skill. For those who lose their way, medical information brokers or specialists in retrieving health data can be an essential resource. These specialists act as expert consultants for attorneys attempting to establish causation linking toxic exposure to disease.

Self-help training poses a viable alternative for individuals interested in utilizing the extensive resources developed and refined by the National Library of Medicine (NLM) over the past few decades. This government-funded agency provides access to information sources for individuals to conduct research on all aspects of the disease process. Researchers can access this vast repository of data through the World Wide Web (WWW) with MEDLINE, which contains more than nine million references published by 3,900 journals.

With appropriate training, users can conduct their own comprehensive research, free of charge. New interfaces referred to as PubMed and Internet Grateful Med are now available for retrieving citations and abstracts on any medical topic. Searchers can order articles from any remote terminal.

As a self-help facility, NLM provides nationwide courses and tutorials directed to Web research, both online and in regional locations. In collaboration with its Online Training Center, the Library has developed a series of excellent, hands-on, one- to two-day workshops for that same purpose. Free classes are scheduled through the year 2000.

The NLM administrator's decision to operate this series of training workshops coincided with a shift in the Library's operations. September 30, 1999 marked the end of an era. Access to ELHILL, the primary gateway for access to NLM database ceased and was replaced by PubMed and Internet Grateful Med. This formal transition to a new operating system inspired the need to retrain users in new searching techniques. Although classes are free and open to anyone, a closer look reveals that many of the courses are tailored to the needs of professional information specialists or those already familiar with Web browsing.

"Introduction to Web-based Searching for Librarians and the Information Specialists: Accessing PubMed and Internet Grateful Med to Search the National Library of Medicine's Database" provides a two-

day, 'how-to' training for researchers with no prior knowledge of MEDLINE or MeSH vocabulary. The introductory course will teach students to use PubMed and Internet Grateful Med as the necessary tools to search MEDLINE and other databases.

NLM trainers will focus on teaching the controlled vocabulary of the MeSH (Medical Subject Headings) system, other printed MeSH tools, the structure and content of other databases and Boolean logic. On a more advanced level, the NLM will offer an alternative course to experienced researchers. "Making the Transition: Converting to PubMed and Internet Grateful Med to Search NLM's Database," assumes some familiarity with MEDLINE and other research tools mentioned above.

Those classes comprise the 1999 schedule. Classes for 2000 include more courses designed to aid users' transition to the new computer and database tools along with a one-day class on "Toxnet: Training on the Web Specialized Module." Toxnet is a Web-based system of databases in the areas of toxicology, environmental health and related subjects.

The course will teach students to penetrate the structure and content of files covering toxicology data, toxicology literature, toxic releases and chemical searching. TOXLINE, the Hazardous Substances Data Bank and Integrated Risk Information are among the databases the teachers will highlight.

While there are no requirements for the Introductory Courses, to enroll in "Making the Transition" and other "conversion" courses, students must have previous experience using MEDLARS and other databases that are the focus of the advanced training.

Interested individuals can register online, by fax or snail mail. Keeping with the spirit of the courses themselves, no telephone registrations will be accepted. Classes are conveniently located at the NLM, the eight regional medical libraries and other medical libraries across the country. Directions for registration and class-site are available on the NLM Web site (www.nlm.nih.gov). The site also lists a toll-free phone number for all Regional Medical Libraries.

Ultimately, the attorneys must take responsibility for costing out the best use of their time and the bottom-line utility of newly acquired skills and information. In the long run, unless they can understand and appreciate the proper use of the information superhighway in the new millennium, they will lag farther and farther behind. ■

ELECTRONIC NEWSLETTERS OF NOTE

by Druet Cameron Klugh, Holmes Roberts & Owen, Denver, CO
Member, PLL Newsletter Advisory Committee

Here are five more suggestions from Druet Klugh for useful "e-zine" reading. Look for other suggestions in future issues of *PLL Perspectives*. Druet plans to make regular e-zine recommendations to help keep all of us up-to-date.

1. While not, strictly speaking, an "e-zine", *The Virtual Chase* is packed with information of use to Internet legal researchers and those who teach them. Here (<http://www.virtualchase.com/index.shtml>) you will find compendia of resources and strategies, many authored by the site's Webmanager Genie Tyberski, Research Librarian at Ballard Spahr Andrews & Ingersoll, LLP. In addition to providing many tips and links to aid in evaluating the quality of information taken from the Internet, Tyberski has vetted most of the content; and it is of consistently high caliber. Note the TVC Alert service that will keep you up-to-date with news about the site and Internet legal research via e-mail. Our thanks to Genie for her efforts and to Ballard, Spahr for sponsoring the site.

2. The *Asian American Law Librarians Caucus* (AALLC) newsletter has been posted on the AALLC's Website at <http://ls.wustl.edu/AALLC/newslett.html>. The current version includes a useful article on macros and a helpful description, with links, of the LC conversion project for PinYin (a system for romanizing Chinese). If you are interested in Asian legal education and resources, check it out. And if you catalog Asian languages, make sure you visit regularly. To contribute, contact editor Hua Li, Cataloging/Reference Librarian at Creighton University Law Library.

3. The *IntraNet Professional* hardcopy newsletter published by *Information Today* is supplemented on the Internet at www.mcq.com/IP. Leading educator Howard McQueen is joined by associate editor Jean DeMatteo; together they keep us posted with instructive case studies of intranet development and information resource management.

4. The Legal Information Services to the Public (LISP) Special Interest Section's electronic **LISP newsletter** is accessible at <http://www.aallnet.org/sis/lisp/newsletter.html>.

Issues 1 and 2 of 1999 include a recap of helpful LISP projects such as gathering pathfinders and library guides, reviews of books on public records research, and tips on useful government sites on the Internet. Editor John Adkins at University of San Diego Legal Research Center welcomes pertinent contributions.

5. In its own words, **LLRX** (<http://www.llrx.com>) is a "Webzine with a special focus on research, management and technology topics for legal professionals." Editors Sabrina Pacifici and Cindy Chick bring their wealth of publishing and technology experience to bear in writing and gathering articles on topics as wide-ranging as career choices, new technologies, marketing and convention highlights-as-they-happen. Updated twice monthly, LLRX features columns and extras that will keep you a well-rounded law librarian. You can sign up at the site for an e-mail service to alert you to new issues. Check out the new format. ■

NEW TRAINING COLUMN

by Rachel Jones, Dickstein, Shapiro, Morin & Oshinsky, LLP, Washington, D.C.,
Chair, PLL Newsletter Advisory Committee

This Winter 2000 issue of *PLL Perspectives* introduces a new feature that is to become a regularly featured column on the training and education of the next generation of lawyers. Many of us have already been called upon by our organizations to provide some type of research and/or online skills training for our new attorneys and paraprofessionals. Some of us have been doing it for years, while others are just beginning to offer this service. Wherever you or your firm find yourselves in this process, you have come to realize that much of the format for the delivery of this kind of training is constantly changing. It has evolved because of technological advances and multimedia capabilities, not to mention the expectations of our very computer literate attorneys.

This column, which debuts in this issue, will be comprised of one or more articles on any number of aspects of the development and delivery of educational programming to your patrons. We hope to avoid "tunnel vision" or falling into the trap of believing that law firms are so unique that other experiences in other venues are not relevant by soliciting the collaboration of our academic, government, court and corporate law library colleagues, as well as seasoned trainers and librarians who serve a different

patron base. Let's face it, when it comes to training, our ultimate goal is to design and deliver the most effective learning experience to our patrons, one that will ultimately result in the improvement of research performance in our organizations. In many situations, we will share some of the same patrons and raise them from law student, to summer associate, to fall associate and to seasoned practitioner. We will be part of that developmental process.

This is a long-winded way of saying that this column can and will be anything we feel is important to report and share when it comes to offering training and education to our attorneys, paralegals and secretaries. Please see this column as an opportunity to share the valuable day-to-day nuggets of information you discover as you strive to educate your patrons and improve their research skills. Tips, tricks, successes, failures and local SIS activities relating to training, are all welcome in this column. If a nugget is all you have to share, we'll take it and combine it with other nuggets. Before you know it, we will have created enough experiences, anecdotes, and information to write a book! Do I have any future volunteers?

We look forward to hearing from you! Happy New Year and happy training! ■

Please send your nuggets, tips, tricks or even an article
to either Rachel Jones or Jan Brown.

If you have questions, please send those too, because others
may share them and perhaps we can find answers together!

Jan Brown,
PLL Perspectives Editor
Montgomery,
McCracken, Walker
& Rhoads, LLP
Philadelphia, PA
(215) 772-7611
gbrown@mmwr.com

Rachel Jones,
Chair, Newsletter
Advisory Committee
Dickstein, Shapiro,
Morin & Oshinsky
Washington, DC
(202) 775-4777
jonesr@dsmo.com

HAVING LUNCH ON COMMON GROUND: LEXIS, WESTLAW & THE HUNT FOR MORE EFFECTIVE TRAINING

by Susan Ryan, Reference/Education Services Librarian, Georgetown University Law Library

On October 26, 1999, several librarians from the Law Librarians' Society of Washington, D.C. gathered at the offices of Arent, Fox, Kintner, Plotkin & Kahn to discuss online database training issues at a brownbag lunch jointly sponsored by LLSDC's Academic Special Interest Section and Private Law Libraries Special Interest Section. About half were from academic libraries, with American, Catholic and Georgetown universities represented. The other participants were librarians from local law firms, representing about eight different firms. The discussion was fast (not to say furious!) with contributions from every quarter. What we learned was that we all have to deal with training our patrons, be they students or attorneys, to use online databases efficiently, and that many issues that we see in our own environments are present in other settings as well.

The librarians present were able to talk about issues surrounding training patrons to use online databases (i.e., Lexis and Westlaw) effectively. The conversation centered around several common problems: the patron's belief that online databases are the only sources of information, the lack of direction that many patrons have at the beginning of their research process and the lack of efficient researching skills that patrons bring to the quest for legal information. An added benefit to the gathering was that the librarians present were able not only to share ideas about ways to train effectively, but also were able to get to know one another and pave the way for future joint discussions.

LEXIS AND WESTLAW ARE NOT THE ONLY WAYS TO DO LEGAL RESEARCH

A timeless point made by both firm librarians and academic librarians is that patrons go to Lexis and Westlaw first, rather than thinking about other sources of information that may be more efficient for a given project. Patrons also do not seem to realize that there are other ways to perform legal research that do not involve online searching; sometimes the same information is contained in a CD-ROM database or printed volume in the library. Why incur online fees if you can find things another way? We have all experienced some variation on the theme of, "I don't know how to find this title; I looked on Lexis and Westlaw, and it's not there!" A familiar interaction in an academic setting is a student cite-checking for law review who doesn't realize that journal articles from the 1960s are not online but are contained in print in the library! In a private setting, attorneys may spend valuable time looking for the text of a case online when it is more easily (and less expensively) available in print.

A LACK OF DIRECTION IN THE BEGINNING OF THE SEARCH PROCESS EXISTS EVERYWHERE

Getting started on legal research is a difficulty for many patrons, regardless of whether they are first-year law students or experienced attorneys. Formulating a game plan before going to either the library or the computer is an important step that many patrons forget; knowing how to start is half the battle. A result of not knowing where to begin is a tendency on the part of patrons to linger on Lexis and Westlaw, thus running up costly charges, as well as wasting their time. Selecting the proper database to search, using services such as "locate" or "find" to keep costs down, and constructing searches before going online were all identified as key points to stress in training. One participant shared a guideline she gives to patrons: "If you have performed more than five searches on a topic without getting useful results, get off the database and figure out what's wrong!"

EFFICIENCY IS THE GOAL IN ONLINE (AND OTHER) SEARCHING

One of the themes of the discussion was the need for greater efficiency in searching for legal information. Training that centers on developing good general research skills, as opposed to product-specific research skills, is what is really needed, both in academia and in the private sector. In addition, greater efficiency throughout the research process is needed: it helps no one to tie up a printer for hours printing articles that are discarded later as unnecessary. Although the need for efficiency is more pointed in a firm environment where time is money, law students struggling to write papers and study for a full load of classes would benefit from greater efficiency as well. As one participant put it, "Efficiency should appeal in both environments."

INTERNET SEARCHING IS BECOMING MORE USEFUL AND MORE USED

Although the original focus of the discussion was Lexis and Westlaw, it is difficult to get a group of librarians together without the Internet rearing its head. Law students are increasingly comfortable with using the Internet, for their personal interests and for legal research. Some schools are offering Internet training sessions, and they have been well attended. Use of the Internet is not confined to academia, however. More firms are training their attorneys to use the Internet for basic legal research, i.e. pulling Supreme Court or other federal cases. The Internet is much less expensive to use than Lexis or Westlaw; however, its organizational features leave much to be desired!

continued on page 11

Having Lunch on Common Ground, continued from page 10

SO HOW DO WE COMMUNICATE THIS INFORMATION TO OUR PATRONS?

Once we had agreed on the points we would like to deliver to our patrons, the discussion turned to effective means of actually doing the training. In an academic setting, training is frequently part of the first-year legal research and writing program. At Georgetown, the first-year students receive two hours of online database training. One firm has instituted "research one-shots"; 30-45 minutes of training that allow attorneys to get the information they need, without having to commit to long sessions that may not fit into their schedules. Of course, serving food was mentioned by all participants as a useful way to entice people into educational sessions!

GETTING TO KNOW YOU ...

In addition to sharing information about Lexis and Westlaw training issues, the brown-bag lunch was also designed to allow librarians from different environments to get to meet one another. Speaking from an academic point of view, it's hard to keep track of all the firm librarians,

where they're working, what sort of work they do (ILL, reference, legislative, etc.), what part of town they're in; and having some faces to go with the names in the LLSDC directory was very helpful. I'm sure the firm folks would say the same thing about academics (the Georgetown, George Washington, George Mason thing is confusing enough for those of us in academia, let alone for anyone else). One of the hopes is that this brown-bag lunch is merely the start of a regular gathering that can discuss other issues as well; preparing students for their summer associate experiences is one idea that leaps immediately to mind. Each group has a lot to share with the other – I think it's worthwhile for the firm librarians to hear about what's happening in the law schools; what sort of online database interface their summer associates will know, what sort of bibliographic instruction they will have had prior to coming to the firm, etc. It is certainly helpful to know what our students will be doing in a law firm when they graduate and what sort of technology they might be using there, so we can better prepare them to be effective searchers and effective attorneys. ■

TRAINING YOUR BOSSES

by Marylaine Block,
Writer, Internet Trainer, Librarian without Walls

I've never been a librarian in a law firm trying to teach her bosses how to retrieve information; but as an academic librarian teaching databases to faculty, I've learned a few tricks for diplomatically training people who outrank me.

PUT YOURSELF IN THEIR SHOES

The first one is to put yourself in their shoes. They're used to being the experts. Having to admit they don't know something is hard on them; having to learn it from one of their own employees is even harder. If you can convince them that you're not really teaching them **CONTENT** they feel that they should know, but just an improved **TECHNIQUE**, you can increase their comfort level.

You can do this by stressing things like convenience—did you know you can search Lexis-Nexis or LawFinder at home? Or you can stress the newness of something, so of course they couldn't reasonably be expected to know how to do it already—can I show you this great new database we just contracted for?

USE YOUR SUCCESSES

If you've been in the business for a while, you will have accumulated at least a few puzzled "How did you do that?" reactions from your bosses. Capitalize on those. If you have a web site or a company newsletter, you could even start a regular "How Did She Do That?" feature, in which you outline some of your more intriguing searches. You could include some of them in the material you send out promoting your presentation.

ENLIST FIRM LEADERS

If you haven't enlisted the help of your firm's leadership yet, you might want to. You probably have performed some of these magic searching tricks for some of the partners, in which case they may actually insist that associates attend your presentation. Knowing the partner thinks something is important dramatically increases the chances that associates will attend and pay attention.

INVOLVE YOUR AUDIENCE IN YOUR PRESENTATION

It's always good to give your audience a stake in your presentation. One way to do that is to ask them to send you some of the research problems they're working on—professional or personal—so that you can use them in your demonstration. Another way is to play to interests you know specific attorneys have. If one of them handles divorce cases, for instance, you might demonstrate how to find a spouse's hidden assets by searching public records online; if one of them is a classic car enthusiast, you might demonstrate how to find classic car clubs and meets, online magazines for collectors, discussion groups or car parts for a Model T.

BE PREPARED TO WING IT

Attorneys who make their living talking value people who know enough to handle the unexpected and improvise good answers on the spot. Make sure you leave lots of time for questions and answers, and be sure that you have done your homework in preparation to appear confident in your knowledge.

DO MORE THAN LECTURE

Remember that nobody learns from lectures alone, no matter how good they are. In a lecture you can explain the theory behind what you're doing. But ultimately they're going to need finger knowledge of how to run their own searches. Leave time for them to play around with databases and the net.

Give them cheat sheets. Create a web page or a handout that repeats key points of your talk and links in important web pages and databases. Give them handouts that explain how to connect from home, and what passwords to use, if any. Give them detailed instructions on how to use the databases, and point them to tutorials, your own or others. And of course, give them your e-mail address and phone number and tell them how happy you'll be to walk them through any problems they're having with any of this.

I hope any or all of these tricks help you as much as they have helped me. ■

THE PUBLIC RELATIONS PROGRAM (OR LACK THEREOF) OF A SOLO LIBRARIAN

by Amy Eaton, Stokes Lawrence, Seattle, WA
Chair, PLL Public Relations Committee

One of the most important concepts behind a successful public relations program is to make it consistent, positive and in the background. Good public relations keep your current customers informed and promote the skills and successes of your library staff. I will be the first to admit that although I have read many articles on public relations and gone to many educational seminars covering it, I do not have a formal public relations program in my library. Like many of you, I have a small staff (just me) and more than enough to do on any given day. If I can barely find time to process invoices, how am I going to find time for a public relations program?

As I thought about it, it occurred to me that I do have a public relations program. Although I have never written it down, I do have a plan, and I take specific actions to demonstrate my contributions to the firm. My public relations efforts are not formal, and they occur irregularly; but I believe that each event helps clarify my role as a law librarian within our firm.

Most of my public relations work is done "on the fly." If I can't get it done quickly, it won't get done at all. As I classify new purchases, I note down the title and call number in draft e-mail. At the end of the month I send the e-mail to all personnel. This quickie project disseminates relevant

information, identifies areas of the practice we are expanding and gives the attorneys a chance to let me know what titles need to be routed to them.

A library newsletter is often touted as the perfect way to inform your patrons of library news and features. I don't have time for a newsletter, but I do write a regular column in the firm newsletter. I use this opportunity to review Web pages, cover developments in the legal publishing industry, announce changes in our online service providers and report other newsworthy items. Once our law firm intranet is up and running, I will be able to provide links to my columns from the library home page.

During National Library Week, I always run a quiz that illustrates the variety of work I do. The multiple-choice questions cover the amount of mail received in the library, the variety of titles routed, sample reference questions, and online service usage statistics. The attorneys are invariably impressed with the wide range of services I provide.

These PR quickies may not change the world, but they do help the library to be seen as a vital part of the firm. If you have PR quickies you would like to share, I would love to hear about them. The Public Relations Committee is always looking for good ideas to share with the PLL membership. # amy.eaton@stokeslaw.com

ALSO FROM THE CHAIR

by Kathie J. Sullivan, Downs Rachlin & Martin, PLLC, Burlington, VT

Do you suffer from Listserv Confusion?? You might not be alone. As the owner of the PLL-SIS list, I know there is some confusion out there. I get requests to subscribe to the list but when I verify with you, it was really privatelawlib-L you wanted!! What's the difference?

PLL-SIS is an autopopulated list created from AALL/PLL membership records. Once you have paid your dues and indicated PLL as an affiliation, you are added to the list every September (Jason Hinkle does a list cleanup and updates membership records every fall. If you have your dues in by then, you are all set. This list is NOT a discussion list. It is a vehicle for the Chair to send news and information to all PLL

members. It is a broadcast list. If you try to post to it, your message goes to the listowner/moderator. For this year, that would be me! The messages are infrequent. If you join PLL-SIS late in the year, do send a message to the current Chair, asking to be added.

On the other hand, **privatelawlib-l** might be just what you ARE looking for. This is the PLL version of lawlib. It is a discussion list and any subscriber can post to it. If you wish to subscribe, send a message to listserv@lawlib.wuacc.edu with the SUBJECT line blank and the body of the message reading "subscribe privatelawlib-l First Name Last Name" (omit the quotes). You'll receive further information in return!

See you on the lists! #

ALA ACCEPTS RECORDS RETENTION PROGRAM

"Law Firm Records Retention & Destruction: Policy Creation and Implementation" is the title of the program which will be presented at the annual ALA conference in Denver. The presentation time is Wednesday, May 10, from 1:45 to 3:30 p.m. Lee Nemchek, chair of the Records Management Group, and Beth Chiaiese will be the presenters. Both are MLS law librarians and certified records managers. They are co-authoring an authoritative practice and procedures manual on legal records management to be published by ARMA International next year. Lee and Beth presented a full-day introductory workshop on legal records management for law librarians at the AALL meeting in Anaheim in 1998.

The session will focus on creating and implementing both client and administrative records retention and destruction policies in a law firm setting. Law firms have lagged behind corporations and government agencies in developing records retention policies and implementation programs. Yet such policies and programs are as important for law firms as they are for other entities. How do you get started? What are the

best practices for drafting retention policies? The program will offer practical guidance and sample policy language designed to help you make a dent in your firm's inactive records inventory.

This program offers an opportunity for those PLL members who also have responsibility for records management, especially those who reside in the greater Denver area, to obtain hard-to-come-by, practical information in this area of legal administrative operations. Nonmembers of ALA can register to attend one day of the annual conference for \$290. For this fee, attendees can attend up to four educational sessions, including the one on records retention. Other PLL members who know that their firms are wrestling with the issue of records retention, should bring this session to the attention of their administrators who may be attending the ALA conference. For those interested PLL members, complete information about the upcoming ALA conference is available on the association's website at www.alanet.org ■

CALLING ALL MULTITASKERS!

News from the Chair of the Records Management Group
 Lee R. Nemchek, Morrison & Foerster LLP, Los Angeles, CA

Are you a private law librarian who wears more than one hat? Are you also your firm's or office's records manager, marketing manager and/or calendar manager? Do you supervise staff from multiple departments? If your answer to any of these questions is yes, you're going to want to be listed in the *PLL Multitasking Networking Directory* that is currently being compiled. This new directory will contain three sections: (1) an alphabetical listing of names, titles, firm names and addresses, contact numbers, e-mail addresses, and administrative areas of responsibility; (2) a geographical listing of multitaskers by city, state, and country, if applicable; and (3) a list of names cross-referenced under over 14 different administrative areas of responsibility.

In late October 1999, preliminary information regarding participation in the multitasking directory and related salary survey was announced on four listservs: SLA-LAW, privatelawlib, legalrec and the PLL-SIS membership distribution list. After the initial announcement went out, many inquiries were received and many surveys were completed and submitted. However, if you happen to be one of those who has procrastinated in sending in your survey or who didn't pay attention the first time around, there is still time to participate. The multitasking

networking directory has the potential to be an invaluable tool for current multitaskers spread far and wide across the country in need of help and advice. Also, think of the (frightful) situations of all of our (unsuspecting) colleagues who will face the (dreaded) prospect of (involuntarily) expanding their job horizons sometime in the new millennium. They'll need help, and those of you who are experienced multitaskers can provide that help by participating in the directory!

Directory listings are still being collected, although a cut-off date will be imposed sometime soon so that the networking directory can be produced and distributed at the AALL 2000 program on "Multitasking: A Pathway to Law Firm Leadership" in Philadelphia in July. If you would like to be listed in the networking directory and do not have a copy of the survey instrument, send an e-mail request to lnemchek@mofo.com. In addition to collecting your directory information, you will also be given the opportunity to participate in the related multitasking salary survey. Does your current salary reflect job responsibilities that have expanded beyond the scope of traditional law librarianship? If you'd like to know the answer to this question, you'll want to participate in the salary survey as well as the directory.

Get in on this important project now, before time runs out! ■

1-9446-2/1-00

PLL PERSPECTIVES

Jan Brown
 Montgomery, McCracken,
 Walker & Rhoads, LLP
 123 S. Broad St.
 Philadelphia, PA 19109

First-Class Mail

First-Class
 U.S. Postage
 PAID
 Permit No. 332
 Toledo, OH