



# Law Library Lights

## The New Library Normal and the New Library Staff

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Another article about how our libraries have changed forever and how they aren't going to change back? Haven't I read that somewhere (or perhaps everywhere) before? And the answers are: yes you have, and yes this is. Because the changes wrought by technology and economics are dramatic, most of us are still grappling with the implications for library operations, leaving us with much to think about and much to do. Vital issues include the addition of new roles and responsibilities, the reordering of our priorities from low to high value, the use of technology to centralize operations and deliver services across geographic boundaries activities, and many more.

This article assumes that we have internalized the need for change and are in the process of revamping our operations to meet both the requirements of today's new normal and the requirements, as yet unknown, of tomorrow. We are not just examining where we want to go but also on the road, heading toward a new set of goals. The most critical component of any blueprint for change is people. How should we be organizing and staffing our operations to meet the requirements of the new normal? For those who entered the profession under different circumstances and with different expectations, what should we be doing to help smooth the transition? For those in leadership positions, how can you ease the way for other members of the team?

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## Documenting Change

Before signing up for a seminar or buying the latest study on mobile technology, it's helpful to articulate the changes you have made, are in the process of making, and plan to make in the near future. The resulting document will help guide decisions as you move forward. A good place to start is with this basic question: *how is management responding to changes in the marketplace and what is my department doing to support these efforts?* Your list may be quite long; here are just three examples:

1. Your firm is negotiating billing rates and promising not to charge clients for learning time. You are responding by increasing training efforts to bring newer associates up to speed so that they can begin contributing to the bottom line.
2. Your firm is working harder to leverage the skills and talents of personnel by developing knowledge sharing systems. You are responding by investigating software and proposing a leadership role for your department.
3. Your firm is centralizing administrative functions to avoid the expensive duplication of administrative functions in every location. You are implementing technologies to centralize library services, including everything from cataloging to collection development, training, and research services.

It's not just our organizations that are changing. Our users are proficient with technology and they expect to take advantage of it at work just as they do at home. This trend will only continue as digital natives swell first the ranks of associates, and then

partnerships and firm management. What is your department doing to respond?

A few examples:

- ▶ Many of your users are do-it-yourselfers, comfortable using software to handle everything from booking travel to creating playlists. You are creating library self-service tools ("My Library" page on the intranet, automated ordering of desk books and routing requests) to meet this preference. (As an added bonus, you are freeing library time for higher value activities.)
- ▶ Your users are working independently, providing fewer opportunities for interactions with library staff. You are implementing marketing and outreach programs to ensure that information users are aware of the resources, services, and products available to them and are employing them to their best advantage.
- ▶ When your users do approach the staff, their questions are complex, requiring advanced research skills and an in-depth knowledge of clients' legal issues and industries. You are changing staff roles from generalists to specialists with the specific knowledge and skills necessary to respond to users' more sophisticated information needs.

**"A good place to start is with this basic question: how is management responding to changes in the marketplace and what is my department doing to support these efforts?"**





Now that you have documented your plans for change, you can consider the best way to organize and staff the department to help bring those plans to fruition.

**“Change can be a challenge for anyone but may be especially tough on long term staff members who are comfortable in their present jobs and hesitant to venture into the unknown.”**

## Staffing for Change

**Department Organization.** Unless your firm is very new, the library was probably organized years ago to support an information world long gone. To accomplish new goals may require changes to divisions, job responsibilities, and reporting lines. These changes may be minimal (revisions to existing job descriptions) or significant, requiring a complete overhaul of the existing structure. Some questions to ask, to help determine whether and what change is required:

- ▶ Is your structure based on geography, with managers and staff in each major location? Would organization by area (research, knowledge management, technical systems) better support centralization of functions and the provision of services throughout the firm?
- ▶ Does every member of the reference staff handle requests as they come in? Would division of labor based on skill level (document retrieval, research, analysis) and subject area help meet

users’ demands for in-depth knowledge regarding practice areas and industries?

- ▶ Is the structure flat, with everyone reporting to a single Director or multi-tiered, with many steps from bottom to top? Would something in between make it easier to provide direction while also encouraging collaboration?

If you work in a one or two person library you may have been tempted to skip this section. But even if formal structural change is not needed, some modifications may help you find the time necessary to learn new skills and take on new responsibilities. For example, can lower value tasks be delegated to staff in other departments or outsourced? Can some of those tasks be eliminated entirely? What about moving software applications from the firm’s server to the cloud?

In departments of any size, these techniques will help ensure that staff members are in a position to drive the changes needed to accomplish new departmental goals.

**Knowledge and Skills.** Change can be a challenge for anyone but may be especially tough on long term staff members who are comfortable in their present jobs and hesitant to venture into the unknown. To succeed in this new reality and to be prepared for what’s to come requires new knowledge and new skills.

### Knowledge

Knowledge refers to learning concepts, principles, and information on specific subjects.

Examples include Boolean search logic, adult learning styles, and copyright law.





## Skills

Skills refer to the practical application of knowledge and information. Examples include using Boolean logic to search online databases, creating training classes based on adult learning concepts, and developing a firm copyright policy to ensure compliance with applicable law.

Skills are often categorized as hard or soft. Hard skills include specific abilities that are easy to define, observe, and measure. Examples include searching Lexis and Westlaw, documenting technical services procedures, and using PowerPoint to create a slide show. Soft skills (also called people or personality skills) refer to behaviors. More difficult to measure than hard skills, they are critical to success. Examples include listening skills, the ability to work as part of a team, and leadership abilities.

To determine the knowledge and skills needed to manage your operation, turn to your list documenting changes made, changes in process, and changes planned. Note the knowledge and skills required to accomplish each new task or area of responsibility and don't limit yourself to the library field. Consider knowledge and skills from the worlds of business, technology, and other relevant disciplines.

To illustrate, let's say management's new emphasis on running the firm as a business has been made clear. No longer will the library budget be approved based on the application of an inflation rate; instead, from now on, you are expected to evaluate and justify every aspect of the library operation. What knowledge and skills are required to comply? Perhaps some additional

knowledge regarding statistics, ROI (return on investment), and other business concepts related to measuring processes would be helpful. The ability to draft concise memos using terms that resonate with decision makers is a must. Lobbying skills, including the ability to present oral arguments in a convincing manner, would also come in handy.

Another example concerns the need to reach out to users in a virtual world. This requires knowledge of and a facility for using technologies for meetings and distance learning, as well as public speaking skills. Also beneficial is an understanding of marketing concepts and techniques to help ensure that your messages are heard.

Identifying the knowledge and skills required to carry out the department's mandate is only the first step. The work itself is accomplished by individuals and so an assessment of the knowledge and skills required to perform each individual's job comes next.

**“Change is chronic. The only question remaining is how each of us will respond to meet the ever changing requirements of our jobs.”**

## Library Staff Roles

The role played by the department within your organization cannot change without also changing the role of individual staff members.





To grow with the job and to ensure that your contribution remains vital requires a plan that addresses how to add to or enhance the knowledge and skills you need to perform today's job as well as how to stay current. We also need a

**“Start with a verb (review, interview, create, teach, read, research), and be creative.”**

plan for adjusting the knowledge and skill requirements as all our jobs continue to morph to meet tomorrow's needs.

A written plan is always best. Depending on the number of people involved and the extent of change required, the plan may be a few lines on a page (e.g., contact the firm trainer to schedule PowerPoint training by the end of the month, join the PLL Competitive Intelligence Group) or an involved series of steps taking a year or more to complete. Some businesses use a formal tool called an individual or employee development plan (IDP or EDP) to capture this information. EDP's provide a structure for articulating the knowledge and skills necessary to accomplish a job (or to move to the next level), what is missing, and the steps necessary to close the gap and keep moving forward. These serve as a written agreement between the employee and the employer and provide a tool for monitoring and tracking progress, and for holding the employee and the employer accountable.

There are many versions of EDPs, of varying lengths and complexity, available on the web (just

throw EDP into your favorite search engine). Your HR department may already have a version it recommends. If starting from scratch, here are some guidelines for creating an EDP:

**Preparation.** Begin with an understanding of job requirements. Consult job descriptions, talk to colleagues with similar responsibilities and review professional association competencies (AALL Competencies of Law Librarianship: <http://www.aallnet.org/prodev/competencies.asp>; SLA Competencies for Information Professionals: <http://www.sla.org/content/learn/comp2003/index.cfm>). Then, identify gaps, including strengths to enhance as well as deficiencies to correct. The more specific your diagnoses the better. “Learn how to present at practice group meetings” is better than “improve public speaking” which covers so much ground that it's hard to know where to start. Finally, rank each item, starring those most essential to your job. The starred items are your goals for the year.

**Getting Up to Speed.** For each goal, articulate the relevance to your job, and then detail the actions or strategies you will take to meet that goal. Start with a verb (review, interview, create, teach, read, research), and be creative. Consider training classes already being provided to attorneys and paralegals in your organization, shadow someone who is already doing the job, or assign yourself a project that will force you to develop new skills. For each action, select a realistic target date for completion. The last step is to describe how you will know when the goal has been successfully met or completed. Here's an example for a research librarian assigned to expand the library's competitive intelligence services.





## Goal

Learn major sources for mining CI data

## Relevance

Knowledge needed to make collection development recommendations which is a prerequisite to developing sophisticated CI services

## Action/Date

Conduct a literature search and review articles re CI resources (April 30)

Interview three experienced CI librarians in comparable firms about their use of CI resources (May 15)

Schedule training classes on three major products (May 31)

## Measurement

Creation of a list of major CI tools and a list of recommendations with rationale for resources to add to the collection

**Staying Current.** Although you could include continuing education activities as actions in your development plan, these activities are distinct enough from the one-time actions listed above that it is easier to note them in a separate section. Include:

- ▶ Print and electronic newsletters, blogs, newspapers, listservs, etc. you will read on a routine basis;
- ▶ Customized tracking alerts you will set up and follow;

▶ Associations, including chapters and sections, you will join so that you can network with members and have access to member-only resources; and

▶ Conferences, workshops, webinars and other educational events you plan to attend over the coming year.

**Approval and Review.** To make this a formal agreement between you and the firm, sign and date the plan and ask a supervisor to do the same. Keep the plan current, noting as items are completed or changing target dates as needed. Review the entire plan annually, changing goals and actions to reflect your progress as well as changes in the requirements of the job.

## Conclusion

**Change is chronic.** The only question remaining is how each of us will respond to meet the ever changing requirements of our jobs. Who is leading the charge for change where you work? Certainly, anyone with managerial responsibilities should be at the forefront but leaders can be found at all levels of the organization. Identify the proponents of change and enlist their help encouraging others to work together to support the department's mission and goals.

For those in managerial positions, it is your job to make sure department members have the support needed to move forward. That support includes funds for training efforts and the time to take advantage of them. For all, keep in mind that the purpose of these efforts is not to torture you. It is to make sure that your job is and remains vital to the organization—and what could be better than that? ■



# From the Editor

## Hello, I Must Be Going

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It does not seem like it has been all that long since I wrote my first Editor's Letter for *Lights* – and yet it has been a year packed with work, ambitious plans, and change. Before I do anything else, I want to express my profound gratitude to *Lights* Assistant Editor Melanie Oberlin and LLSDC President Roger Skalbeck. When the zombie apocalypse comes, these are two people you want on your cross-country road trip: they are smart, practical, very supportive, and they will both keep you laughing. The *Lights* editorship is now in Melanie's exceptionally capable hands and Roger is handing the LLSDC presidency off to Scott Bailey. I know Melanie and Scott will have a great year.

This month's theme is strategic planning, a topic that tends to incite extremes of either religious fervor or (more often) paralyzing ennui. I am reminded of a time my mother had to write such a document for work: her carpool companion asked her what her strategic plan was. Her response was a classic, "Put something down on paper so I don't get fired." I believe she suffered from what many people experience when tasked with producing some sort of strategy: an inability to define just exactly what a strategic plan *is*. What does it look like? What makes it worthwhile? How simple or complex should it be? What separates strategy from tactics and why does the difference matter (or does it)?

This issue does not answer all of those questions, but the articles we have collected go a long way toward giving law librarians tools they need to plan, measure, and respond to the constantly changing landscape in academia, law firms, and government service. ■



### Submission Information

*If you would like to write for Law Library Lights, contact Melanie Oberlin at [moberlin@gmu.edu](mailto:moberlin@gmu.edu).*

*For information regarding submission deadlines and issue themes, visit the LLSDC website at [www.llsdc.org](http://www.llsdc.org).*





# Book Review

## Richard P. Rumelt, *Good Strategy/Bad Strategy: The Difference and Why It Matters* (New York: Crown Business, 2011)

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I suspect that as a group, we librarians don't spend a lot of time thinking about business strategy. I know I tend to go through most of my day dealing with research requests as they come in. If I spot a news article, an upcoming congressional hearing, or a case filing that might be of interest to my attorneys, I'll send that on. Some days are busy; some days are slower. I enjoy my job and feel appreciated. All this is great, but is it enough? I'm sure Richard Rumelt, the author of *Good Strategy/Bad Strategy*, definitely would not think so. Rumelt holds the Harry and Elsa Kunin Chair in Business and Society at UCLA Anderson School of Management, and, according to my *Good Strategy/Bad Strategy* book jacket, "is one of the world's most influential thinkers on strategy and management."

Initially, I chose this particular book mainly because the Amazon.com reviews indicated that it was a very readable and relatively practical introduction to strategic planning, the topic for this issue of *Law Library Lights*. Now that I've read the book, I've become convinced of the importance of formulating and implementing a good business strategy. We librarians always seem to feel we have to justify our existence. Instead of feeling constantly threatened by forces we feel we can't control, we should be thinking much more strategically about our roles

within our institutions. More importantly, our efforts need to be directed towards what Rumelt calls **good** strategy.

Does your library or organization have a vision statement? A mission statement? A list of core values? A list of aspirations or goals? If you answered yes to any of these, well, bully for you, but Rumelt doesn't care. Worse than that, you're deluding yourself if you believe any of those things mean you have a strategy. None of these things are part of **good** strategy. You can call them strategy if you want, and many people



# Book Review, Continued

do, but they're examples of what Rumelt refers to as **bad** strategy.

How about ambition? Do you believe you (and, by extension, your organization) can achieve anything you want if you work hard enough and have faith in yourself? People who equate positive thinking with strategy and business success are especially exasperating to Rumelt, who made me laugh out loud with this assessment:

I do not know whether meditation and other inward journeys perfect the human soul. But I do know that believing that rays come out of your head and change the physical world, and that by thinking only of success you can become a success, are forms of psychosis and cannot be recommended as approaches to management or strategy. (p. 76)

Related to this idea that positive thinking makes things happen is having a goal, such as wanting to increase profits by 20% annually, and thinking that's a strategy. Rumelt is adamant that growth for growth's sake is inadvisable, a proposal that law firms would do well to keep in mind (and not just now when Dewey & LeBoeuf's collapse is so fresh in our minds). "The proposition that growth itself creates value is so deeply entrenched in the rhetoric of business," he says, "that it has become an article of almost unquestioned faith that growth is a good thing" (p. 155-56). Growth is not necessarily bad, but

Rumelt insists that "Healthy growth is not engineered [by mergers and acquisitions]. It is the outcome of growing demand for special capabilities or of expanded or extended capabilities. It is the outcome of a firm having superior products and skills. It is the reward for successful innovation, cleverness, efficiency, and creativity" (p. 159).

So if having a vision statement, believing in the power of positive thinking, and wanting the company to make more money or get bigger don't qualify as good strategy (although they may definitely qualify as bad strategy), what does Rumelt think good strategy is?

A good strategy does more than urge us forward toward a goal or vision. A good strategy honestly acknowledges the challenges being faced and provides an approach to overcoming them. And the greater the challenge, the more a good strategy focuses and coordinates efforts to achieve a powerful competitive punch or problem-solving effect. (p. 4)

Librarians and their libraries face numerous challenges. Sometimes we don't feel especially relevant, visible, and/or vocal within our organizations; we have to deal with budget cuts imposed from above; we design training programs for attorneys who say they don't have time to attend them. We tend to be reactionary, rather than proactive. Formulating and





## Book Review, Continued

implementing one or more good strategies using Rumelt's principles can help us face our challenges and give us powerful ways to increase our value and visibility.

Rumelt identifies three essential elements to any good strategy: (1) a *diagnosis* of the nature of a challenge, (2) a *guiding policy* for overcoming the challenge, and (3) a set of *coherent actions* to carry out the guiding policy (p. 77). In choosing a particular challenge and designing a strategy focused on that challenge, it's important to keep in mind what Rumelt calls "proximate objectives." A proximate objective identifies "a target that the organization can reasonably be expected to hit, even overwhelm" (p. 106). In other words, focus your efforts and resources on goals that can actually be achieved. Understand your advantages: "Teams, organizations, and even nations have advantages in certain kinds of rivalry under particular conditions. The secret to using advantage is understanding this particularity. You must press where you have advantages and side-step situations in which you do not" (p. 161). Librarians often have unique skills and backgrounds not found elsewhere in their organizations; how can these advantages be exploited?

As I'm sure you can tell from the discussion above, I think Rumelt's ideas have a lot of potential value for librarians. The problem with

the book for our purposes is that, while the principles Rumelt advocates may hold value for individual teams and divisions within an organization, none of the explanations or examples are addressed to the unit level. Rumelt's examples tell of military battles won and lost; the 1960s mission to the moon; "bad" CEOs who were foolish enough not to follow his advice; "good" CEOs who identified and exploited competitive advantages or who successfully reorganized their entire companies; and the contributions of executives and students in his seminars and courses. In other words, while it would be extremely helpful to have some concrete examples of effective intra-organizational strategic planning, you won't find those examples in this book.

Nevertheless, I would recommend Rumelt's *Good Strategy/Bad Strategy* to all library directors and any librarians who have an interest in taking an active role in promoting and increasing their library's value within their organizations. His distinction between good and bad strategy will help you avoid wasting effort on goals that ultimately can't be implemented and will help you focus on those areas where your strengths really can make a difference. A good strategy is a key asset for achieving success. As Rumelt observes, "The first natural advantage of good strategy arises because other organizations often don't have one" (p. 11). ■





# Planning the Meetings for the Strategic Plan, A Strategy

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If your team has decided to either update or develop a strategic plan, plan for meetings. Strategic plans, at least plans that have team buy-in are not solo exercises but instead require multiple meetings where team members can engage in forward thinking about their sense of where the library team is and opportunities for the future. Developing a plan and process for these meetings is critical for a strategy that is to be more than a paper plan. There are lots of articles, models and plans on writing a strategic plan and I will not address those here. Instead, these are the insights I have developed from leading meetings in the development of a strategic plan.

## Decision makers

Strategic plans are both a group and individual exercise. Prior to any meetings final decision makers and writers should be put in place. Knowing who will perform these roles will determine who needs to be at meetings. Likewise these decision makers need to have the authority to assign and allocate the time that will be required to carry out other steps.

## Where you sit is where you stand

Strategic plans are strategic not because they include everything, but because they ask the questions “where do we want to be?” and “how do we get there?” However, they do need to be meaningful to all members of your team. The decision of who is at the table may also determine later buy-in for your plan. The axiom *where you sit is where you stand* affects participation in these meetings. When you issue invitations depending on the size of your group consider not only departments, but also levels of your organization.

Insights can come from all levels, but not all levels may feel comfortable sharing their thoughts. Being aware of and managing power relationships in these meetings is critical to gaining insights from all participants. It may feel uncomfortable, but power relationships need to be explicitly understood as part of the process.

**“Insights can come from all levels, but not all levels may feel comfortable sharing their thoughts. ”**

## Facilitation

This role is defined as one that “helps to bring about an outcome by providing indirect or unobtrusive assistance.” This is the one role that is worth outsourcing from your internal organization. If you cannot afford an outside consultant consider a neutral person from another department such as marketing. If you decide to have a person within your group facilitate the meeting they then need to be comfortable in limiting their own input. Whoever performs this role needs to think about the setting, i.e. will everyone be in the room or will some people be remotely conferenced. Also consider tools that can enable brainstorming such as poster size memo boards, post-its and sharpies. The facilitator should also consider if they are comfortable acting as the scribe or if another participant should have such a role. Again consider what doing that role could have on their ability to participate. The scribe also needs to be able to capture decisions that are made, action items and to whom they are assigned. Notes from the meetings should be distributed to participants soon after the meeting to avoid stalling future meetings.





## Agendas and time keeping

One of the hardest parts of any meeting is a realistic agenda and sticking to pre-set times. Strategic planning requires thinking through a lot of unknowns: put fewer items on your schedule so that you don't lose opportunities for more in-depth discussion due to time constraints or a crowded agenda. Consider using other tools such as polls or exchanges of information to prioritize your time in meetings to those type of discussions that don't work well in an electronic format.

## Schedule breaks and meals

Often if you are bringing people in from remote locations, the inclination is to cram the schedule to get as much value from that trip as possible. Don't do it. Make sure there are sufficient breaks in your schedule for participants to sit back and check their email and reflect. Likewise, try to avoid too many working meals, casual discussion times often produce opportunities for insights that can be missed in too structured an environment.

## Planning and Research

The strategic planning process requires both self-evaluation within your organization and a wide lens view of factors affecting your organization externally. Prior to your meetings distribute both internal statistics and information and external studies (or summaries) to participants so that can come to your meetings prepared.

## Ground Rules

At the beginning set the basic ground rules and scope for that meeting. Because these meetings are asking a person to think big they can easily lose their focus. Here are some rules that need to be made explicit.

**"The strategic planning process requires both self-evaluation within your organization and a wide lens view of factors affecting your organization externally."**

**1.** Identify the final decision maker in terms of what will be in the plan

**2.** Outline the decision making model for recommendations from the meeting:

**Consultative** – i.e. partial decision that will be considered by the leader

**Group Decision** – i.e. vote or consensus (agree to agree)

**3.** Accept that some topics may need to be left in the parking lot because the plan cannot resolve those issues.

**4.** Let go of the past. Often strategic planning starts because of a significant organizational event like the departure of a leader or lost staff. All must agree that planning is an aspirational process of where you want your organization to go.

## Alternatives to meetings

A strategic plan is an end goal: how you get to that point can also encompass a multitude of other processes. Consider using surveys (free resources are available from Google docs and Survey Monkey) polling amongst your group and of your patrons. Discussion boards on tools like MS SharePoint can also provide an alternative venue for getting input. These alternatives can be especially useful for garnering the ideas of those in your group that are more comfortable sharing electronically rather than verbally in a meeting.

While very few of us wake up one morning and say, "Yes bring on the meetings!" do not miss the opportunity to build a strategic plan just because you dread meetings. Embrace them as an opportunity to enhance your organization's culture and future.

The author would like to thank her fellow Thompson Coburn librarians for helping her learn to do these meetings on the job. Also hat tip to the [Lexican](#) blog for many of these insights. ■





# President's Column

## Make Time for Strategy this Summer

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Summer can be an odd time of year in law libraries, especially here in Washington. From the outside, it should be the time to get projects done. It should be free of stress. We should all have a chance to tackle big projects. We should have time to develop sound strategy for our libraries and our careers. Of course, for most of us, summer is hectic. It's busy, stressful and often short-staffed.

We have summer associates, summer conferences, and summer travel. And don't forget, in DC we also have *summer heat*. With distractions like these, who has time to plan and strategize? To preserve our professional status, we had better make time for strategy this summer. I am a big fan of strategic planning, and I am excited to see this as the focus for the Summer 2012 issue.

Strategic planning in all its forms is beneficial. Whatever time you can create to plan strategically will be worthwhile. Also, you don't have to rely on empty platitudes and vague jargon. Consider the first two values listed in the [Washington and Lee Law Library Strategic Plan](#):

1. Service is our only product.
2. The needs of our user community inform all of our work.

These values should be relevant to almost all law librarians. During this year's LLSDC Town Hall meeting, AALL Board Member and private firm librarian Greg Lambert gave a talk where he mentioned the 3-foot radius of the law library. As stated in a post on *3 Geeks and a Law Blog*, Greg argues that we should "stop thinking of the library as a place and think of it as the services provided, regardless of where that service takes place." Here, the 3-foot reach of the library is represented by everything you can reach out and touch. Whether it's your reference book, your keyboard, mouse or the telephone, opportunities for meaningful and valuable service are rarely more than three feet away. When you commit to plan strategically, service should be the value for focus. This summer should be the season for strategy.



The Summer 2012 issue marks my last column as LLSDC President, and I'm glad to see this volume of *Lights* end on the topic of strategy. As I enter my year as past-president, I'll remain on the board and try to help LLSDC with some strategic planning and longer-term vision projects. I'll commit to making time for strategy this summer. Will you?

Thanks to all of our members for the hard work that goes into our educational programs, elections, meetings, and resource sharing. LLSDC continues to be a great chapter, and with a bit of time for strategy, we'll be here for a long time to come. ■



# Strategy: More than a Ten Letter Word

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*Strategy.* Ha. Way back in 2000 when Saturday Night Live poked fun at President George W. Bush by coining this whimsical word, they articulated a concept of frustration with plans that are not well thought out but possibly well meaning.

Law Library strategies can be similarly frustrating and fraught with jargon. Many of us have been involved in strategy projects associated with buzzwords that seem to go nowhere and do not have the next step in mind. Buy-in decreases as ineffectiveness is observed and the strategy project loses momentum. KM? CI? SWOT Analysis? Workflow? People have bandwidth? Value propositions?

Aligning our law library and research strategies with the institutions we support can be a moving target. We see our larger organizations, whether they are law firms, universities, corporations, or government entities engage in strategies and planning for their overall operation and we want

**“Many of us have been involved in strategy projects associated with buzzwords that seem to go nowhere and do not have the next step in mind.”**

to participate. We want to find a corresponding strategy that works to support the objectives of the overall organization. Sometimes this involves fighting our way onto a committee or reading between the lines of management memos, but however we get there, we know we either are doing or should be “doing” strategy.

After a major international merger in January of 2011, our rebranded Research Services Department needed to develop a strategy. We saw that our firm was engaging in high level strategy and moving toward integrating our larger global organization and we wanted to reflect that in our own operation. With a staff that was now positioned more globally than ever, communication needed to increase and conversations about our objectives seemed to be a good vehicle to introduce our new global team and our capabilities to each other.

Informally I had an opportunity to ask my Chief Administrative Officer what one word he would most like to see us embody. He said --without batting an eye -- “Integration.” Given that succinct directive and the idea that strategy itself can be a way to learn about our components and bring them together, we started our journey.

Our approach to this daunting and wide sweeping project was to divide and conquer, ironically the opposite of integration. Deconstruction. By breaking down what we do into constituent parts we were hoping to make real progress toward effectiveness and integration. Plus, a conversation between less than ten people usually results in a better conversation than trying to get thirty people on a multi-time zone call that involves the US, UK, EU, and Australia. So we thought about our general categories of service and came up with the following strategy teams, overlapping components of our strategy-based on what we do and what we would like to integrate:





- ▶ Client Service
- ▶ Research Best Practices
- ▶ Technology
- ▶ Resource Management
- ▶ Strategy Integration

We deliberately wanted to mix up our teams to include members from different legacy firms, geography, skill sets, and backgrounds and luckily that worked out. Dividing our 30 global research services staff members into those four groups on a volunteer basis was easy enough, but now what do we do with it? We have to have measurable strategy points associated with real outcomes, right? Otherwise it just devolves into “strategy.” Metrics and projects associated with each area were developed to be able to sustain them and judge their effectiveness.

Each team was asked to come up with a few central strategy points relevant to their area with the expectation that real progress had to be measured from the projects associated with those strategy points. The expectation was that these teams would have regular calls and then report back to the overall department. Our professionals were engaged in new ways and were innovating during every call and the results were inspiring, but could they be sustained?

Regular meetings measuring progress against commitments and priorities continue to take place and some projects have naturally risen to the forefront as priorities for the general group. We conducted an internal survey of our department to help guide our strategy and the overwhelming impression was that we needed higher visibility. We were good at telling each other about the great work that was coming out of our department, but were we good at communicating outside of our group to other stakeholders and most importantly our customers/clients?

The client services team soon began to communicate about client services as part of their mission.

Outreach to our firm by way of the intranet and informal elevator speech opportunities increased and so did our visibility. Training was also emphasized in those outreach efforts as a significant component of visibility and client service.

Resource management focused on contemplating model budgets and product evaluation processes as well as collection development strategies which eventually led to discussions about integration and what to do with firm growth and future office openings. How do we anticipate the newly acquired office and allocated resources to it?

The research best practices team looked at service issues such as providing 24/7 coverage, workflow issues, and research tracking software evaluations. The technology team focused on our library management system integration, effective use of our library administrative tools and our intranet involvement.

**“We have to have measurable strategy points associated with real outcomes, right? Otherwise it just devolves into “strategy.””**

While not all of these ideas and practices can become fully integrated and actionable immediately, the conversation itself is ongoing and meaningful to our operations. Consideration of what we are trying to achieve and why is essential to getting to the how, the costs involved, and the benchmarks that we will use to measure their level of success introduces us to each other: an insightful global handshake, if you will. Were we doing a lot of these things before we formalized a strategy? Of course. Was the dialog and development of the strategy part of the overall move toward “Integration?” Definitely. Projects for all four groups are in place and progress has been made. Evaluation of these efforts will be an ongoing process, but we have most definitely moved from strategy to strategy. ■





# Member Spotlight

## Joan Marshman & Alyssa Altshuler

In April, Joan Marshman was promoted to Manager of Research Services and Alyssa Altshuler was promoted to Senior Manager of Library Services at Ropes & Gray LLP.

## Robert A. Oszakiewski

In April, Robert A. Oszakiewski celebrated his 5th anniversary of being the DC Librarian for Porter Wright Morris & Arthur LLP.

## Barbara Folensbee-Moore

As of May 14, Barbara Folensbee-Moore, formerly of Morgan Lewis & Bockius, became the firm library director at Venable, LLP.

## Michael S. Timpani

As of May, Michael S. Timpani became the permanent law librarian at Orrick, Herrington, & Sutcliffe, LLP.

## Debbie Shrager

On June 18, Debbie Shrager begins work as a full-time Reference Librarian at George Mason University Law Library

## Elmo Dattalo

As of April, Elmo Dattalo retired from Steptoe & Johnson and has moved to Las Vegas.

## Jennie C. Meade & Kasia Solon

Jennie C. Meade, Director of Special Collections at The George Washington University Law Library, has been elected vice chair/chair-elect of AALL's Legal History & Rare Books SIS, and Kasia Solon, Student Services Coordinator at The University of Texas School of Law, has been elected secretary/treasurer of LH&RB. Kasia, a former member of LLSDC, was the Rare Books and Reference Librarian at The George Washington University Law Library before moving to Texas in 2009.

## Sharon Kissel

Sharon Kissel, ACLU Legislative Librarian and past president of the Law Librarians' Society, was recently honored by the ACLU for her 15 years of service on civil rights and civil liberties issues.

A tribute to Sharon was entered into the May 10, 2012, Congressional Record by Rep. Eleanor Holmes Norton on behalf of the ACLU.

## Sima Mirkin

Sima Mirkin, Associate Law Librarian at American University Washington College of Law (WCL) was awarded the first Robert and Billie Jo Kaufman Pence Law Library Faculty Scholarship for: Sima Mirkin & Michael J. Petit, The Philip C. Jessup International Law Moot Court Competition: Subject Indexes & Finding Aids (Wm. S. Hein & Co. 2010). Independent reviewers selected her piece for the award which is designed to mirror faculty awards at WCL that promote the culture of scholarship.





# Member Spotlight, Continued

## Honorary Memberships for LLSDC Awarded to Two Leaders in the Legal Community

***Roger V. Skalbeck and Scott Bailey***

*Former and Current LLSDC Presidents*

We are proud to announce awards of LLSDC Honorary Membership for two leaders in the legal community: Elaine Gregg and Greg Lambert. The earliest Honorary Membership award on record is listed in a 1960 edition of *Law Library Lights*. Among the five named recipients is Margaret E. Coonan, a professor and law librarian at University of Maryland Francis King Carey School of Law. We're excited to count Greg Lambert and Elaine Gregg among the few to receive this Honorary Membership. They are both friends to several of us in the law library community. We look forward to working with both of them in the future.

### Greg Lambert



Greg Lambert

Greg Lambert is an experienced law librarian, blogger, technology strategist, and computer programmer. Greg's experience spans academia, the courts and the private law firm world. Inside the law librarian community, Greg contributes to our profession as an active Board Member for AALL. In this capacity, Greg visited LLSDC for our chapter visit and Town Hall meeting, where he gave an energetic talk about traits of a law librarian.

Outside the librarian community, Greg is probably best known as a chief contributor to "3 Geeks and a Law Blog." On the blog, Greg regularly covers challenging topics and finds interesting tie-ins to subjects relevant to us as librarians. In writing for this blog, Greg's experience in technology and his understanding of the legal market help us think critically about our profession and those we interact with. In his role as a librarian at *King & Spalding*, Greg helps coordinate information between the library, records, KM, marketing, client growth and the rest of the partnership.



# Member Spotlight, Continued

## Elaine Gregg



Elaine Gregg and 2012-2013 LLSDC President Scott Bailey.

*Photo by Jeffrey Cole, Regional Facilities Manager, Squire Sanders.*

Elaine Gregg is an innovator and networker of the first order who is committed to spreading the word about the value of law librarianship to the general legal community. A veteran law firm administrator with over 20 years of law firm experience, she enjoys working closely with libraries and librarians. In the early 90's, she built out the Dallas-based law firm of Johnson & Gibbs,

which included a beautiful library designed by Studios Architecture. Elaine was responsible for hiring their first librarian in D.C. She later planned and executed the build-out and move of 400 personnel for Latham & Watkins. Elaine Gregg is currently the Legal Administrator at *Shaw Bransford & Roth*.

Beyond the requirements of her current and past positions, she continues to be actively committed to the Association of Legal Administrators and supports their goals of reaching out to other professional organizations such as LLSDC. She was instrumental in inviting the first librarians to gain access to the Law Firm Vendors Association (LFVA) networking events. Elaine was on the first committee to partner vendors with the ALA Capital Chapter and formed the first sponsorship levels, which remain today. She has been a member of ALA since the mid 80's. As a Past President, she is a lifetime member of the Capital Chapter.

She continues to work on committees – most recently on the “Disaster Preparedness” half-day seminar, and is working with the current chapter leadership to promote LLSDC and law librarianship with a special post-PLL Summit Expo, a model which will be used by the national leadership of PLL in other major markets to promote what we do. ■



## Mind Map Your Plan

**Harvey Morrell**

*Associate Director for Information Technology at  
Baltimore School of Law, hmorrell@ubalt.edu*



I have to admit that when I heard that the topic of this issue was going to be about strategic planning, I shuddered. For me, strategic planning conjures up images of communist-era five-year plans—plans that were rigidly adhered to and failed over and over again. My visceral reaction to strategic planning was further enhanced by the couple of times I participated in the strategic planning process. The first time I participated, a whole lot of time was spent coming up with ambitious plans that were largely aspirational and which were promptly forgotten a month later. We would have been better off using a random strategic plan generator such as the one humorously envisioned in the CronkNews blog (<http://www.cronknews.com/2011/10/04/random-word-sequence-generator-helps-new-administrators-with-strategic-planning/>). The other time I participated in strategic planning, the plan ended up being used as justification for cutting the library's budget.

Still, there are times when strategic planning is useful. One of the best things about strategic planning is that it forces us to look at the big picture—to look at the forest and not just the trees of our daily tasks and routines. Given the rapidly changing environment in which libraries find themselves, this is not a bad thing, especially when we need to keep ourselves relevant.

I have some tech tools to talk about that might help you when you are called upon to participate in the strategic planning process and are at the brainstorming stage: mind mapping software.

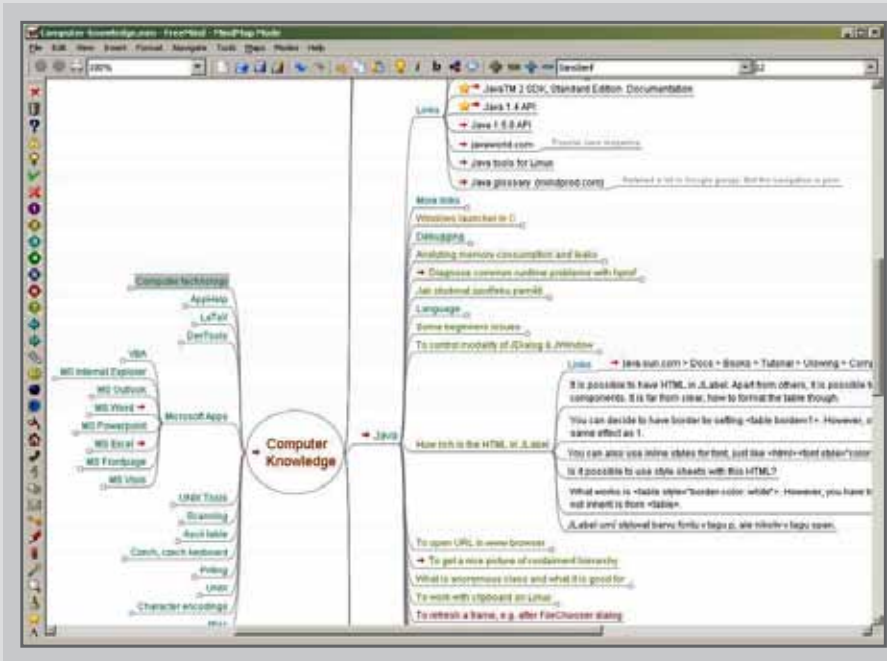
Brainstorming is typically an integral part and the initial phase of developing a strategic plan. Brainstorming often involves input from many people. Thus, these mind mapping tools are good for initiating the strategic planning process and enabling many people to participate in the process.

Mind mapping software is a way to brainstorm in a structured way using diagrams or to take notes in a graphical way. These are especially good tools to use if your learning style is visual. The three tools are: FreeMind, XMind, and Bubbl.us. All are free and will work on Windows/Mac/Linux platforms, although FreeMind requires Java enabled on your computer.



# Tech Talk, Continued

## FreeMind



What's nice about FreeMind (besides the price) is the extensive wiki-based support, which will answer almost any question about FreeMind that you can think of. The visual elements are customizable, if you are into that sort of thing. The FreeMind webpage ([http://freemind.sourceforge.net/wiki/index.php/Main\\_Page](http://freemind.sourceforge.net/wiki/index.php/Main_Page)) does a pretty good job of selling the software and explaining the features. On the left is a screenshot from that page.

## XMind

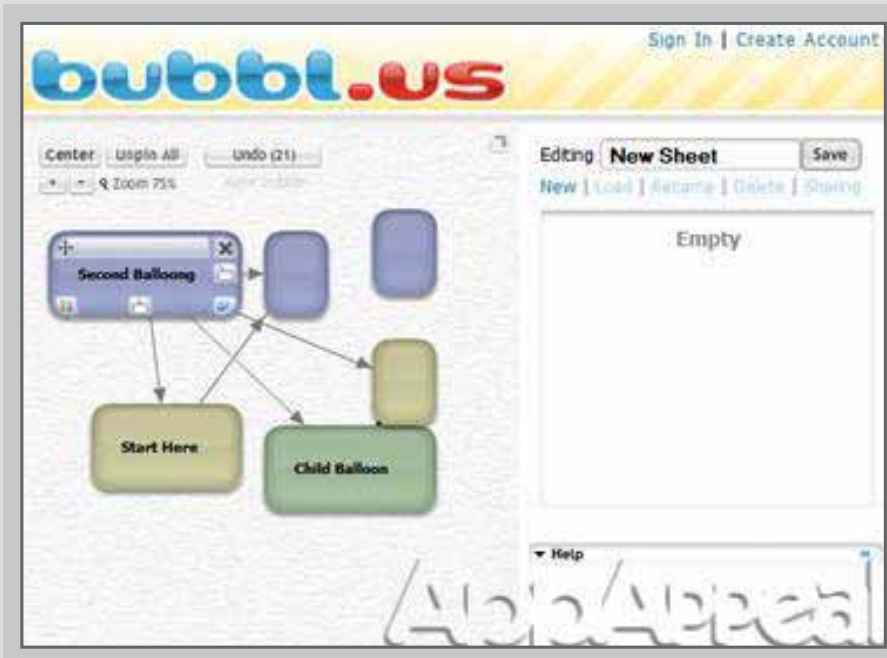


As you can see from the screenshot on the left, XMind is a bit more visual. The interface is pretty intuitive. While there is a pay version, the free version is pretty robust. You can collaborate with others online and export your map into HTML/PNG/GIF/JPEG/BMP formats. A full explanation of the different features of the free and professional pay versions can be found at the XMind website (<http://www.xmind.net/pro/features/>)



# Tech Talk, Continued

## Bubbl.us



Bubbl.us (<https://bubbl.us/>) markets itself as a brainstorming tool and is very easy to use. The application allows users to create mind maps, which consist of bubbles with text in them connected by lines. You can invite others to join your bubbl.us, making collaboration fairly straightforward. You can save your Bubbl mind map as an image, or embed it on your website. A review of this application, which also explains many of its features, can be found at AppAppeal (<http://www.appappeal.com/app/bubbl-us/>).

No matter what tool you use, mind mapping can be an excellent aid to brainstorming, bringing some order to the chaos that is the beginning of the planning process. ■

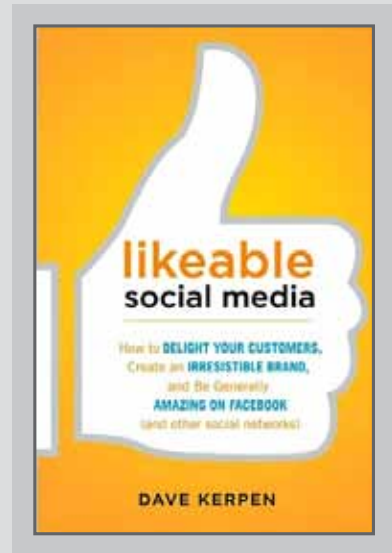


# Book Review

## **Dave Kerpen, Likeable Social Media: How to Delight Your Customers, Create an Irresistible Brand, and Be Generally Amazing on Facebook (And Other Social Networks), McGraw-Hill, 2011**

*Tracy Woodard*

*Law Librarian and Customer & Technical Services Team Member,  
Kuta Software LLC, pesttea@msn.com*



Just prior to Facebook's initial public offering (IPO), General Motors pulled their advertisements from Facebook saying GM was unable to determine a direct correlation between car sales and Facebook use. Facebook went public that Friday as one of the highest tech IPO offerings. Mark Zuckerberg married his Harvard University girlfriend on the Saturday. Monday saw Facebook shares down from the heady opening price that grabbed headlines.

Is Facebook here to stay? Or maybe Google+ is here to stay? Is email dead? We may see technical Facebook changes as an improvement, a new distraction, an invasion of privacy, or without much importance. However, we know that Facebook has hundreds of millions of users globally and that social media technologies are changing the way the we communicate with each other.

Will social media replace contemporary forms of communication like email? Maybe not, but you can find chatter online asking the question, "Is email a dead technology?" Clara Shih, CEO and founder of heasaysocial.com and author of the book *The Facebook Era: Tapping Online Social Networks to Market*, asks the question, "Is email dead?" at an Enterprise 2.0 conference in 2009 (<http://>

[www.youtube.com/watch?v=9faFO6E8h2Q](http://www.youtube.com/watch?v=9faFO6E8h2Q)). Her argument is that more people are choosing interactive social media as their primary mode of digital communication.

Have the law school professors and students Tweeted you a question or in-boxed you on Facebook? Do the attorneys at your law firm contact you via iPhone, Blackberry, or Android? Is your law library's blog or Facebook page "Liked" by numerous interactive users? What can we do? There is one answer: we can revisit what we already know and see how we can refresh ideas for maximized results.





# Book Review

The book *Likeable Social Media: How to Delight Your Customers, Create an Irresistible Brand, and Be Generally Amazing on Facebook (And Other Social Networks)* advises companies on how to manage a successful Facebook page in order to build continued interest in the company.

The advice in *Likeable Social Media* has is based on eighteen concepts. Those concepts correlate to the eighteen chapter headings in the book. The most important concepts are highlighted in the conclusion. They are: **Listen Up**, **Transparency Is the New Default**, **Respond to Everyone**, and **Just Be Likeable**. The author promises that if companies implement the concepts for their Facebook pages, it will lead to “brand loyalty” (p. 67). He also gives the opinion that brand loyalty on social media will lead to greater marketing competitiveness (p. 89).

The concept **Listen Up** means listen to your targeted audience and use their interests as discussion points on the company’s Facebook page. The goal is to create a connection with your customers (p. 22). You can do this by sharing stories on Facebook (p. 120) and showing an interest in your company’s Facebook friends. Chapters one, ten, twelve, and fourteen explain this concept.

**Transparency Is the New Default**, covered in chapter nine, instructs readers to be honest about products and services. The goal is to build “brand trust” (p. 109). You can do this by disclosing objectives and being honest about who the company is (p. 116).

The concept **Respond to Everyone** means answer all of your Facebook comments. You can do this by replying to positive posts, answering negative complaints immediately, admitting mistakes (p. 189), and not deleting any comments (p. 77). The goal is to be authentic, which the book defines being human, for damage control (p. 84). Chapters six, seven, and sixteen address this concept.

The last concept in the book is called **Just Be Likeable**. It is a pun on the title of the book and the author’s social media marketing firm Likeable Social Media. The concept **Just Be Likeable** is the author’s way of reminding companies to use the eighteen concepts in the book to achieve greater social media success (p. 221).

In summary, the book offers strategies on how to manage a successful Facebook image with your interactive base of friends that Like the page. Facebook pages, marketing, and money are a reoccurring theme in the book. Chapter fifteen is about using Facebook Ads to target your audience and it reveals some numbers showing increased Facebook Likes of company websites. However, except for a few examples, the author doesn’t exactly show reports or data to back his idea that brand loyalty on Facebook correlates to boosted sales, but that idea is not entirely farfetched. Overall the book does a good job offering advice for companies that are thinking about maintaining a Facebook page. The book is certainly about companies, marketing, and money, but the advice applies just as well to libraries. We can use the concepts presented to continue to make the social media interactions between law libraries and our users excellent. ■





# Getting Your Strategic Plan Back on Track

**Morgan M. Stoddard**

Reference Librarian, Georgetown University Law Library  
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Strategic planning is a challenge. Creating a strategic plan requires a significant investment of time and careful consideration of—among other things—the library’s values and goals. The implementation of a strategic plan can be even more difficult. Librarians struggling to develop or implement a strategic plan in their library may have attended the recent AALL webinar *Get Your Strategic Plan Back on Track When It Goes Off the Rails* (“Back on Track”), led by Pat Wagner, a

strategic plan, recognize signs that the plan is not working, identify common mistakes, and measure progress and success.

For librarians who missed *Back on Track* but would like to watch the webinar, an archived copy is available on AALL2go. For those *Lights* readers short on time or unable to access the webinar on AALL2go, here are five of the valuable strategic planning tips from *Back on Track*:

**“Ms. Wagner provided a number of practical suggestions and advice in the hour-long webinar, including tips on how to create and implement an effective and achievable strategic plan, recognize signs that the plan is not working, identify common mistakes, and measure progress and success.”**

consultant with Pattern Research, Inc. and moderated by Gail Warren, State Law Librarian, Virginia State Law Library. Ms. Wagner provided a number of practical suggestions and advice in the hour-long webinar, including tips on how to create and implement an effective and achievable

**1. “Project management and strategic planning are two sides of the same coin.”** It is vital to incorporate project management principles from the beginning of the strategic planning process. Additionally, there needs to be project managers who are interested in, and excited about, the goals, and a library should provide project management training if needed. Good project management better enables a library to control two common hindrances to the successful implementation of a strategic plan: “project drift,” which occurs when an organization loses focus on the goals and invests time and resources elsewhere, and “project creep,” which occurs when an organization does not take adequate account of constraints of time or personnel, leading to missed deadlines and exceeded budgets.





**2. Establish “benchmarks”.** In order to effectively implement a strategic plan and measure progress and accomplishment, an organization must clearly define how success is measured by setting “benchmarks.” A good benchmark identifies *what* will be accomplished and how to determine *when* it will have been accomplished. Statistics can be utilized in benchmarking, but libraries should be careful not to rely too heavily on metrics.

**3. Ensure accountability.** A strategic plan can be derailed by a number of common mistakes, including absence of leadership, insufficient allocation of resources, and unrealistic goals. The most detrimental mistake is lack of accountability. *Everyone*—from managers to staff—has to be accountable for success.

**4. Beware of the “activity trap”.** When implementing a strategic plan, everyone must understand the difference between goals and activities. Without this, it is easy to fall into the “activity trap,” which happens when a lot is getting accomplished, but it is not contributing to the completion of a goal. It is essential to assess whether particular activities—including long-established activities and practices—further a goal or goals.

**5. Do not be afraid to change or discard goals.** *Back on Track* included advice on how to have a “big intervention” as well as a “quick intervention” to restore a derailed strategic plan. Whether a library is engaging in a major reassessment and overhaul of a plan or taking more basic, corrective action, it is important to consider which goals are most essential (and which are not so essential) and be willing to change or even completely discard goals if necessary.

As noted previously, creating and implementing a strategic plan is a challenging endeavor, and many organizations will experience some difficulty. During *Back on Track*, participants were asked to answer a question about the state of their strategic plan. Only seven percent of respondents said there were no issues with their strategic plan. By using the strategies highlighted from *Back on Track* and other proven tactics, however, a library can overcome most obstacles and problems and ultimately produce and execute an effective strategic plan. ■

## Resources

### Strategic Assistance Pattern Research

(<http://www.pattern.com/>) assists libraries and other organizations with strategic planning and project management.

### Webinars

Archived AALL webinars can be viewed at <https://www.softconference.com/aall/>.

### Further Reading

*Back on Track* included a list of recommended resources for additional information on strategic planning, including:

- ▶ John E. Johnson & Anne Marie Smith, *60 Minute Strategic Plan: 2 Stages, 12 Steps, 300 Words...Planning and Problem Solving For the Real World* (2007)
- ▶ Robert Bradford, J. Peter Duncan & Brian Tarcy, *Simplified Strategic Planning, a No-Nonsense Guide For Busy People Who Want Results Fast!* (2000).





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