



The Reference Desk

Good things are happening at MALL and I am looking forward to our busy season. Our joint conference with five other chapters is happening in Milwaukee from October 19 through the 21st. MALL will be represented by Pauline Afuso and Karen Westwood who each had a program accepted.

If you are unable to make to Milwaukee you can hear about it at the Fall Meeting which will be held on October 24 at the Highland Park Public Library. Our speaker will be Michael Roback, Director of the Schoenecker Law Library and Dean for Technology and Information at the University of St. Thomas Law School. Click [here](#) to read his recent *Bench & Bar* article, "Legal Tech: The Future Starts in Law School".

Attendance at MALL events has been up over the last year and we have had several successful collaborations with other organizations, including the SLA, the MLA, and the Joint Conference Chapters; LLAW, CALL, MAALL and MichALL. It has been great to see this renewed enthusiasm for our organization and its mission. There will be some new opportunities ahead for all of us as MALL's finances improve and we launch some new initiatives.

I would like to thank the Executive Board, Valerie Aggerbeck, Teresa Meyers, Mary Freyberg and Neal Axton for their hard work. I would also like to single out Pauline Afuso who wears a number of hats at MALL and gives generously of her time. Finally, I would like to thank Elizabeth Schutz and Wendy Fossum for their dedication to this newsletter and for waiting patiently for this column.

EDUCATION CORNER

CLE

- [Tax Law Institute](#), 11/13/2017, CLE Conference Center, 8:30am—4:45pm
- [The Legislative process in Minnesota](#), 12/12/17, CLE Conference Center, 90:00 am—4:35 pm
- [Elimination of Bias: R.A.V. v. City of St. Paul – Its History and Legacy on the 25th Anniversary](#), 12/15/17, CLE Conference Center, 10:00am-12pm
- Full MN CLE list [here](#)

CONFERENCES/WEBINARS

- [Beyond Bitcoin : What is Blockchain and what does it mean for law librarians](#) (Free) 11/16/17 11:00am CDT (Online)
- [How Laws are Made](#) (Free) 2:00-3:00 pm EDT. **Courts** 10/24/17
- [Path to Lawyer Well-Being](#), (\$) Online, 10/31/2017, 12:00-1:00pm CDT
- [Direction of US Tax Reform](#), (\$) Online 11/13/17, 8:35-9:50am CDT
- [Ethical Client Service](#), (\$) 11/17/17 9-11am CDT



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MY VIEW FROM AUSTIN SUSAN CATTERALL

First of all, I want to thank the MALL Awards, Grants & Scholarship Committee for the financial support I was given in order to attend the 2017 annual American Association of Law Libraries conference in Austin, Texas.

Attending the annual conference was, as always, an exciting and enriching opportunity.

In particular, I am grateful for the opportunity to present the program I had proposed – the inclusion of competitive skills research as part of the law school curriculum.

Two old adages come to mind. The first is “everything old is new again.” “Competitive Intelligence” has long existed in libraries, specifically with regard to special libraries and business libraries. In the last couple of

years there has been renewed interest in CI as evidenced by the increase in the number of webinars and programs sponsored by AALL and SLA. Presently, AALL is launching a “Competitive Intelligence Foundations” program which will assist librarians develop a competitive intelligence function within their respective firms.

There has also been interest in moving competitive intelligence skills training into the academic classroom as part of law practice management. (see Matthew M. Morrison, “Due Diligence: Company Information for Law Students,” 108 *Law Library Journal* 427 (Summer 2016) and Catherine A. Lemmer, “Using Competitive Intelligence to Develop Practice-Ready Legal Professionals,” 34 *Legal Reference Services Quarterly* 268 (2015).)

The second well-worn phrase that resonates with me is “what goes around comes around.” After the 2005 AALL Conference, in San Antonio, I proposed a program on competitive intelligence to the Private Law Library – Special Interest Section. That program launched the CI Caucus, now a section of the PLLIP-SIS. Therefore it is

appropriate to note the symmetry in returning to Texas and noting the number for competitive intelligence programs offered at the AALL annual meeting. By my count, there were at least 5 programs, including the one I coordinated, “Due Diligence and Competitive Intelligence: The “New Practice-Ready Skills.”

I have never been a CI analyst, but I have worked with marketing departments and their analysts and am a very good researcher. When I moved from Minnesota to North Carolina and transitioned from private law libraries to academic libraries, I was tasked with teaching an asynchronous advanced legal research course. The course consisted of weekly units and the students were to build upon their research skills and their knowledge of



resources when completing the final assessment, a research pathfinder. I decided to include a mid-term assessment, a mini-briefing book on a public company. Students were to approach the assignment as if they were preparing for a meeting with a “C” level executive and the general counsel. The mid-term assignment wasn’t a true briefing book because the students were expected to cite their sources and evaluate both the information and resources for each component of the briefing book.

MY VIEW FROM AUSTIN SUSAN CATTERALL

The project was a good fit. The school I worked for prided itself on experiential education and I wanted to approximate a practical work product. I also wanted to emphasize basic information literacy skills, such as critical reading and the ability to evaluate both information and resources. I gradually learned that there were other academic librarians who were teaching competitive intelligence skills, usually as part of an advanced legal research class.

When I read Matt Morrison's article in *Law Library Journal*, I called him, told him how much I enjoyed his article and asked him if he would be interested in presenting with me at AALL. He agreed and our proposal was accepted. Matt and I were asked to include a law firm librarian, especially one who conducted competitive intelligence or trained young associates how to do so. I contacted Kevin Miles, Manager of Library Services at Norton Rose Fulbright US LLP in Dallas and co-chair of the CI Division. Kevin recommended Kathleen Agno, Knowledge and Research Intelligence Director at Greenberg Traurig LLP. He admitted that he would have been willing to be our third speaker, but he was speaking opposite our program as part of a panel that was addressing competitive intelligence in a "deeper dive." However, he graciously agreed to serve as the "expert" in the July 2017 "Reference Desk" column in the *AALL Spectrum*. By no mere coincidence, the column had to do with creating a Competitive Intelligence program in a law firm and highlighted Kevin's program at the 2017 AALL conference, "Making Sense of Intelligence: Analyzing and Writing a Report on the Prospective Business."

Kathy, Matt and I were fortunate to have Martin Korn, Director of Research and Library Services at Sheppard, Mullin, Richter & Hampton LLP, as our AALL Liaison. Martin scheduled conference calls, facilitated a dry-run, attended our program and participated in the Q&A segment. We three had a great deal of information to pack into only an hour. Kathy started us off with an overview of what the competitive intelligence landscape looks like in private law firms. This included information about who might conduct competitive intelligence research, the major types of requests for information and a summary of the types of tools which are used.

I discussed the reasons why due diligence research skills should be included in law school curricula and referenced several studies which had analyzed the research skills which law school graduates should pos-

sess. I alluded to the AALL principle statements and research competency standards, especially those which addressed a legal researcher's ability to evaluate information. I explained that I often used the C.R.A.A.P. criteria as a tool in my advanced legal research course. C.R.A.A.P. is an acronym for Currency, Relevancy, Authority, Accuracy and Purpose and is attributed to the Meriam Library at the California State University, Chico. As I indicated previously, we three speakers had a great amount of information to share. I included a detailed, sample briefing book assignment and a copy of the rubric by which it was assessed, as additional, down-loadable documents. Then I passed the baton to Matt.

Matt teaches a very popular business/due diligence advanced legal research course at Cornell University School of Law. He requires the students to profile a company by focusing on three distinct perspectives: what the company says about itself versus what third parties, such as analysts and news sources say about the company versus what "insiders" (and he defined that term for the attendees) say about the company. Matt also detailed some of the specific resources he covers in his course, such as SEC filings, Mergent and Capital IQ. As is customary, we left time for questions and we were disappointed by the number and quality. We received questions from both private law firm librarians who asked about student access to specialized products and whether those of us in law school libraries would consider inviting a law firm librarian to address the class. The program seemed to be of interest to several types of libraries.

Again, I would like to thank the members of the MALL Awards, Grants & Scholarship Committee for their generosity in assisting my attendance at the conference and my opportunity to present on this timely topic.

AALL 2017 Spotlight Topic - New Business Intake: Expanding the Law Firm Librarian's Role

Wendy Fossum

While attending AALL 2017, I made many useful connections, was inspired by the keynote speaker, and attended a number of informative sessions (I even managed to sneak in a bit of fun), but I was on the lookout for ways to make my library value-added to the firm as a whole. While some firms do bill research, the trend is not to view libraries as profit centers, which I think is fine. However, in that mindset, we need to make sure firms don't see our work as an unnecessary expense either. One key way to do so is to look at ways the library can integrate further and more meaningfully with different departments and the firm as a whole.

Much has been made of the law firm library working with the marketing department, and I think that is a very valuable area, but it's also not the only department the library can assist. At AALL 2017, I attended a session called *The Law Firm Librarian's Role in New Business Intake*, and I thought the speakers had wonderful ideas on a new (at least to me) area for the law firm librarian to offer assistance.

During the presentation, they talked about the leading types of clients that can cause claims (\$686 million total from 2011-2016). While most can guess the "Honesty Impaired" client as a source of headache (and costs!), the others were more subtle. Clients who are "Competency Challenged" or just in over their head are likely to unwittingly provide poor information or make a fatal misstep. Also the "Rambo Litigation" client may seem good due to the amount of work they can request, but, when a client will sue even when it is not in his best interests, that can blowback on the firm in multiple ways.

The library's assistance can range from occasional requests for particular difficult to assess potential client information to a more integrated role. Law firm librarians can make checklists for red/yellow flags that include the instruction to ask the library for further research if certain criteria is seen in the initial stages. While new business intake obviously starts before business is accepted, it can also expand to monitoring new clients. Since law firm librarians are generally exceptional at setting up and monitoring information/news via alerts, doing so for those involved in this process is another value-added the library can bring.

If your library has done company research in a marketing capacity, I feel like experience in that type of research can translate into new business intake. In fact, if you are trying to find a way to convince a firm to integrate the library into this process, experience in business research for marketing can settle the anxiety of those nervous to hand over or share an important and essential responsibility with a new department. Showing them the results you've achieved for one department will make them more comfortable with putting their results and reputations on the line with your information.

While this article has offered the reasoning and basic outline of how law firm libraries can integrate further with their firms by being involved in new business intake, the AALL full presentation is definitely a must if one is interested in this topic. You can go [here](#) and access it with your AALL login.

With the ever-changing environment of law and law firms in particular, it's important to make sure the library is appreciated and able to reach its full potential to assist the firm. While this is definitely helpful in increasing job security, it is also beneficial to the firm to allow for decreased risk and the expenses associated with taking on an "Unworthy Client."



Reflections on a Profession

Barb Minor, Retired MALL Member

In December of 1984, I made a major shift in the direction of my career as an information professional. Over my first decade out of college I had worked in a corporate library and as a multimedia marketing manager. At this transition point, I chose to accept a reference position in a law firm library - quite a different setting. I also joined the Minnesota Association of Law Libraries. Who would have thought that 33 years later I would still be a member! I've made numerous other career path choices during those years, zigzagging into publishing, training, and IT stints as well as the more expected KM and research tracks. Somehow I always wandered back to law librarianship. Now that I have reached the last major crossroad in my 50 years in the workforce - retirement - I feel the need to reflect on a constant thread running through that tapestry. That is the programs and people of MALL.

Newbies to our profession may question the relevancy of associations for 21st century librarianship. Yawn - meetings and publications are so boring. I just can't make time in my schedule for the annual meeting or the Legal Research Institute or Downtowners. Is it worth a whole \$40 a year? I would argue that the benefits of participation in a professional association go so far beyond any single event that the excuse of busyness or boredom is laughable. Here are a few ways being an active and interested member of MALL has helped me succeed and persist.

Personal connections. The position I took in 1984 was vacated by Kathy Kelly, who was moving on to head her own firm library. Yes, that's the same Kathy Kelly who is still a contributing member of MALL and still not retired. I do not have enough digits to count all the warm and wonderful friendships I have enjoyed with fellow members, social contacts that have gotten me new jobs at least twice. Over the years we have shared celebrations, kid stories, moves out and up, and, sadly, deaths. Cancer has taken a number of our brightest lights from us, and we grieved each passing as a group. Sipping wine at evening meetings, listening to a member play carols on his harp for a holiday party, and sampling one more tasty morsel provided by our kind sponsors at a conference - these are good memories of the human side of professionalism.

Professional Support Network. I have also appreciated the support of all the members who taught me how to be a law librarian. I knew nothing about the legal profession in 1984, so I made the shift with much trepidation. My new manager said the fact that I knew something about the library piece was enough, and that I could learn the law part. And indeed I have learned, thanks to so many MALL colleagues. Here's a special shout-out to the firm librarians: they were the real world examples of how my job could be done well. At the beginning there were the St. Paul ladies in the First Bank Building, from Briggs & Morgan and Doherty, Rumble & Butler, who would loan that oddball treatise or answer a question over the phone. That circle spread to the whole Minneapolis Downtowners entourage, and then outside our firm-based clique to the Lawyers' Joint Law Library, the county and state and court librarians, and the impressive academics with law degrees AND library degrees. Where else could you hang out with the State Law Librarian on a regular basis? And you can learn a lot sitting with your peers at the display table at a bar association convention or St. Kate's career fair too.

Educational Opportunities. One-to-one exchanges were not the only opportunities MALL membership provided. On the local level we had knowledgeable speakers at every regular meeting and there were nationally known librarians in town for the spring conferences. In later years, we brought them into our midst virtually. Our own members gave selflessly of themselves for the Research Institute, teaching us and non-law-librarians about Minnesota research and administrative law and the life cycle of litigation. If we were fortunate enough to also be part of AALL, we could travel to see all the library superstars during one week in July. They offered talks on every imaginable aspect of providing information to the legal community, and survival tips for us as individuals. There was fun too: I'll always remember the West party featuring the Woodbury HS marching band, Anita Anderson on the dance floor, and library cart drill teams. We were even able to supply Minnesota star power when the AALL came to town for two national conventions. We oldtimers won't forget Garrison Keillor riding in a convertible with our own dear Anne Grande, then putting on a special PHC show for us at the Guthrie.

Building Other Career Skills. Through all of these MALL encounters and sessions and excursions we were acquiring important career building skills. Our myriad MALL committees required us to learn teamwork and time management. Event planning was vital for local, regional, and national meetings hosted by the chapter. How many of us never worked with a printer or caterer before MALL? Communication skills could be honed through the newsletter, PR pieces, and exhibits. And we had a laboratory to practice our technology know-how with the MALL web site, the listserv, and innumerable presentations. Perhaps most important are the leadership abilities we cultivated as local committee chairs or officers. Many of our members have also advanced to major positions at the national level, from committee and interest group leaders to president of AALL.

Back in May, you, my fellow MALL members, showed your appreciation for my work over the years by honoring me with an award. That plaque has a proud place in my home, reminding me daily of my good fortune in being part of such a great organization. At the time they happened, pasting clip art onto paper newsletter mockups, cleaning up dinner trash after others had gone home, and handing out trinkets to law firm administrators didn't seem important. But seen as part of that tapestry I mentioned, every thread meant something in the construction of a career. Do make time in your career for this unique Association. You too will look back and see the many people and programs that contributed to your journey as a legal information professional. Take it from me: you need a group like MALL. And MALL needs YOU to create even better opportunities ahead.

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The MALL Newsletter is the official publication of the Minnesota Association of Law Libraries, a chapter of the American Association of Law Libraries. It is published four times per year and is a benefit of membership in MALL. Annual membership dues are \$40US. Membership renewals are due by July 1 of each year. For membership information or change of address, MALL's web site at <http://mall.widapricot.org/> or contact the Membership Chair.

Five Things

Reflections on my First AALL Annual Meeting

I first heard tales of it several years ago, as an MLIS student interning at Washington County Law Library. In all the libraries I worked at and every library association meeting I attended, someone mentioned it. Fast forward to 2017 – I finally got my opportunity to attend the legendary AALL Annual Meeting!

It lived up to all my expectations – here are my top five takeaways from the experience.

Number One: Plan Early

As soon as the emails from AALL started coming, I checked out the conference hotel options and reserved a room at the Hotel Van Zandt, a boutique hotel slightly away from the main conference area, but definitely within walking distance. It ended up being one of the best decisions I made. The location, in the heart of one of Austin's most trendy neighborhoods, was fantastic. There were fun amenities, such as the offer of a beer at check in, a yoga mat in my room, and a daily happy hour where guests (and their friends) could enjoy complimentary beverages in the gorgeous lobby area. I'm not known for making snap decisions, but by reserving early, I got a great rate and my pick of the hotels (the best ones filled up quickly).

Another advantage of planning early was that I had plenty of time to submit grant applications. I ended up doing two applications, and while the MALL grant application was fairly straightforward, the AALL grant application process was more complicated. As a first time conference attendee (and grant writer), I was taken by surprise that these deadlines were so far in advance of registration.

Number Two: Solicit Recommendations

Because I was the only one from my library able to attend, I circulated the program schedule among my colleagues and asked for their recommendations – both for programs they would like to attend themselves and for programs that they thought would benefit our library.

I also solicited ideas about things to see and do in Austin from everyone I could think of.

Number Three: Follow Recommendations

Hands down, the best experience I had at the conference was CONELL, a full day program for new(er) librarians. One of my new acquaintances and I shared a laugh as we listened to every speaker tell about the lifetime friends they had made at CONELL, but the joke was on us -- he and I will keep in touch and eagerly seek each other out at future meetings. There were so many things from CONELL that I revisited over and over during the conference – tidbits from the guided tour of Austin, early access to SIS booths and

info, friends I made at the Friday night Dutch treat dinner. Theirs were faces I recognized and connections I leaned on throughout the conference and all its attendant activities.

Be sure to explore the host city! I enjoyed many activities and venues around Austin that I never would have found on my own.

Number Four: Learn a Lot

There was an incredibly wide variety of educational programs serving a broad range of interests, and the keynote speaker was inspirational.

I was able to collect and share information, handouts, and materials from the recommended programs, and compile all of it in a meaningful way for my colleagues who were unable to attend.

Number Five: Have Fun!

Opportunities abounded to meet up with colleagues during planned activities like breakfast, poster displays, vendor exhibits, and formal and informal meals. After hours, there was plenty of time for socializing with old and new friends - happy hours, dinners, parties, and bat viewing.

I found conferencing to be unexpectedly intense, so I learned to build down time into my schedule.

Lessons Learned:

- Planning is good, but I can be more flexible about changing the programs I attend.
- It really is ok to get up and leave in the middle of a program.
- I really want to go again (Baltimore 2018!)

I will be reaping the rewards of attending the AALL Annual Meeting for years to come. I hope I am able to inspire someone to attend this meeting the way my colleagues inspired me.

- Lisa Heidenreich, Research & Instructional Librarian,
Mitchell Hamline School of Law



2017-2018 COMMITTEE CHAIRS

Archives
Vacant

Awards, Grants, & Scholarships

Vic Garces:
garce003@umn.edu
612.624.2597

Consulting/Community Outreach

Vacant

Downtowners

Beth Northcutt: bnorthcutt@fredlaw.com
612.492.7621
Abby Willemsen: awillemsen@fredlaw.com
612.492.7556

Education

Valerie Aggerbeck
agge0008@umn.edu

Exchange

Susan Trombley: susan.trombley@courts.state.mn.us 651.297.7659

Government Relations

Andrea Wambach: andrea_wambach@ca8.uscourts.gov 612.664.5830

Membership

Abby Walters: Abigail.walters@ag.state.mn.us 651.757.1050

Newsletter

Wendy Fossum: wfossum@lindquist.com 612.371.2417
Elizabeth Schutz: eschutz@briggs.com 612.977.8054

Nominations

Neal Axton: safetyneal@gmail.com

Placement & Recruitment

Liz Reppe:
liz.reppe@courts.state.mn.us 651.297.2089

Public Relations

Vacant

Publications

Vacant

Tech Services SIG

Vacant

Web Committee

Pauline Afuso: pauline.afuso@co.washington.mn.us 651.430.6330

Webmaster

Neal Axton: safetyneal@gmail.com



Our mission is to facilitate the administration of and access to justice through the dissemination of legal information and through education of its members and the public.

2017-2018 MALL OFFICERS

President

Charles Wilson
cwilson@lindquist.com

Vice President/President-Elect

Valerie Aggerbeck
agge0008@umn.edu

Secretary-Treasurer

Teresa Meyers
teresa.meyers@maslon.com

Member-at-Large

Mary Freyberg
mfreyberg@co.scott.mn.us

Past President

Neal Axton
Safety.neal@gmail.com

