

Register to attend by January 15th to receive your 15% discount!

Ark Group/Managing Partner Magazine's 4th Annual

# Best Practices & Management Strategies For Law Firm Library & Information Service Centers

*Reshaping the law firm library to achieve excellence in a new economy — successfully positioned and integrated to effectively support both the business and practice of law*

February 25, 2010

AMA Executive Conference Center  
New York, NY

## This one-day forum is designed to help you:

- Assess seismic changes taking place in the legal profession and its impact on law librarianship and information services
- Increase value for your firm through a better understanding of the business and research needs of the lawyers you support
- Contribute to the creation and support of new law firm billing models
- Re-engineer your firm's knowledge-sharing initiatives — positioning the library as a strategic knowledge resource and an indispensable, strategic asset
- Improve strategic planning initiatives in the face of structural change — as demands for services and expectations morph in parallel to a changing media world
- Integrate and solidify the library into the profitability equation—leveraging cross functional synergies that enable the firm to better understand its own clients and strengthen its position in the market
- Identify KM initiatives in which librarians possess the core competencies required to take on expanded roles
- Demonstrate to firm leadership that your goals are aligned with the firm's business goals

## With Key Contributions & Real-World Illustrations from:

- Baker & McKenzie LLP
- Cravath, Swaine and Moore LLP
- Debevoise & Plimpton LLP
- Dewey & LeBoeuf LLP
- DLA Piper LLP (US)
- Hogan & Hartson LLP
- King & Spalding
- Milbank, Tweed, Hadley & McCloy LLP
- Weil, Gotshal & Manges
- White & Case LLP
- Winstead PC

## Event Sponsors:



\*Lead Sponsor

priory solutions

Researched by:

ManagingPARTNER



THOMSON REUTERS™

# Best Practices & Management Strategies For Law Firm Library & Information Service Centers

Reshaping the law firm library to achieve excellence in a new economy — successfully positioned and integrated to effectively support both the business and practice of law

February 25, 2010  
AMA Executive Conference Center  
New York, NY

Dear Colleague,

These are not just changing times – but perhaps the most challenging period the legal profession has ever faced. The industry is on the brink of fundamental transformation as law firms seek new ways to deliver legal services and grow revenue in the face of the most difficult business environment in decades. There is little doubt that a new era in law firm management is at hand – as library and information service professionals strategically position themselves within this new paradigm.

There has already been a seismic change in law librarianship. And change is propelling librarians forward in a world where they must adapt to new ways of thinking about the information over which they are stewards.

Today's law firm library is an integral and integrated component of the firm – effectively supporting both the business and practice of law. Embracing a broader view of their professional roles, librarians are helping to re-engineer their firm's knowledge-sharing environments, positioning the library as more of a *strategic knowledge resource* with greater implications, firm-wide – increasing your organization's ability to take effective action, compete and survive.

Ark Group/Managing Partner Magazine's 4<sup>th</sup> annual forum, **Best Practices & Management Strategies for Law Firm Library & Information Service Centers** will once again provide a unique opportunity for meaningful dialogue in an intimate setting – with an undiminished focus placed on extensive audience participation. This year's esteemed speaking faculty represents a myriad of perspectives and is truly a group of highly skilled and experienced professionals who know the industry and the subject.

As leaders and managers within the profession, several key questions need to be addressed—

- Is your firm's library proactively serving the business *and* the practice of the firm?
- As information professionals, how do you support (or even drive) the coordination and optimization of knowledge within your firm?
- Can the law firm library and information services help enable new economic models?
- In this new paradigm, are you leveraging the skills and expertise of the law firm library to assist in the development and creation of new (value or alternative) billing strategies?

It is a given that the role of today's law firm librarian must continually evolve to meet various new technological, marketing and business development challenges. As we continue to face these challenges in an ever-shifting market—where competitive forces, new media and information technologies are re-sculpting law firms—we must also be willing and able to wear the hat of a business manager. In the pursuit of excellence in this new economy there exists a very real opportunity for the library to leverage skills and expertise in a continuing effort to improve upon the business model of the modern law firm.

We sincerely hope you'll join us this year in New York as we put our heads together and collectively identify business opportunities within the firm that not only help lawyers practice more efficiently and effectively, but also deliver more value to the firm's clients.

Reserve your seat at the table today...

## ABOUT YOUR CONFERENCE CHAIRPERSON

### Terri L. Lawrence, Director of Library and Information Resources, Winstead PC



**Terri L. Lawrence** possesses 25 years of extensive library operations and management experience, including 15 years as Director of Library and Information Resources for large law firms. She is a proud graduate of the University of Rhode Island - for both her BA and MLIS degrees.

Terri's primary role at Winstead has been to increase use of the firm's online technology and leverage opportunities for information sharing. As director of the library, Terri and her team of highly skilled librarians oversee the collection development and online informational resources and processes firm wide. Maintaining vendor relations, contract negotiations, attorney training, and staff development are among the many tasks Terri undertakes daily. The library staff are the lead developers of SharePoint technology applications for Winstead's Intranet.

Terri is actively involved with the firm's marketing team—assisting with client team and industry team information sharing and development.

She also serves as a consultant to evaluate new online products introduced to the firm. Additionally, her responsibilities include records management and conflicts. She has recently completed writing and implementing the firm's retention policy and procedures for annual destructions according to archival deadlines.

Each day, she provides the firm with a newsfeed of topics and news impacting Winstead and Winstead's clients. Terri has presented at the annual conference for Special Libraries Association, American Association of Law Librarians, Dallas Association of Law Librarians, and several university library programs.

Before entering the legal industry, Terri served in a variety of Director and Manager of Library and Resource Center roles for several organizations, including Dallas, Texas-based Meeting Planners International (MPI), and Newport, Rhode Island-based Syscon Corporation. Terri is a published author, having written many procedural documents for the U.S. Department of Defense Trident Submarine Program's "Standard Operation Procedures for Library Operations," and "Handling of Classified Materials," among others. In addition, she has published several research documents, including "Diversity Calendar, Diversity Resource Guide," "Robert's Rules of Order-At-A-Glance," and "All-Purpose Tipping Guide"—all of which are currently being sold by MPI. In addition to being a published author, Terri has also completed the research for several books, including "Winning with Diversity" and "Legal Research on the Internet."

# Best Practices & Management Strategies For Law Firm Library & Information Service Centers

*Reshaping the law firm library to achieve excellence in a new economy —  
successfully positioned and integrated to effectively support both the business and practice of law*

## Agenda: Thursday, February 25, 2010

**8:30AM Registration & Refreshments**

**9:00AM Opening Remarks: Conference Chairperson**  
Terri L. Lawrence, Director of Library and Information Resources, **Winstead PC**

**9:15AM Keynote Address**

### **Knowledge Management as an Evolution of Traditional Librarianship**

There has already been a seismic change in law librarianship. And change is propelling librarians forward in a world where they must adapt to new ways of thinking about the information over which they are stewards. This opening address will illustrate how law firms are re-engineering their knowledge-sharing environments, effectively positioning the library a true *strategic knowledge resource* — increasing your firm's ability to take effective action, compete and survive. As Knowledge Management becomes more ingrained in standard legal practice, librarians will be forced to redefine themselves as KM managers — creating value for the firm through a better understanding of the business and research needs of the lawyers they support. Knowledge management, as an evolution of traditional librarianship, means identifying business opportunities for your firm. These opportunities result in helping lawyers practice more efficiently and effectively and also help to maintain (if not cement) the library as an indispensable, strategic asset.

Steven A. Lastres, JD, MLS, Director of Library & Knowledge Management, **Debevoise & Plimpton LLP**

**10:00AM Panel Discussion**

### **The Librarian's Role in KM—Why the Law Firm Library Should be Playing a Larger Role in Portal Development**

Librarians have the expertise to manage and develop custom taxonomies making the portal platform a more powerful and precise search tool. This interactive session will highlight KM initiatives in which librarians possess the core competencies required to take on expanded roles—specifically focusing on:

- The librarians role as project manager in the creation and deployment of knowledge communities
- Joint efforts with the marketing department to launch client team sites and client relationship partner teams
- How librarians can lead the effort to manage digital/electronic content on portals - creating virtual communities of research materials relevant to specific practice communities
- The creation of the taxonomical structures required to drive the indexing of portal content

#### **Panel:**

Steven A. Lastres, JD, MLS, Director of Library & Knowledge Management, **Debevoise & Plimpton LLP**, Julie Bozzell, Deputy Chief Knowledge Officer, **Hogan & Hartson LLP**, Alirio Gomez, Global Director of Library & Information Services, **Milbank, Tweed, Hadley & McCloy LLP**

**11:00AM Morning Coffee Break**

**11:30AM Panel Discussion**

### **Reshaping the Law Firm Library to Achieve Excellence in a New Economy**

Most would agree that we are at the beginning of a new era in law firm management. If so, how should library and information services position themselves in the new law firm paradigm? This interactive panel discussion will illustrate how the library can be successfully positioned as an integral, integrated, element of the firm — effectively supporting both the business and practice of law. Our esteemed panel will showcase best practices in working in tandem with other firm departments and initiatives (such as CI, Marketing, Finance and IT) and how the library is changing and aligning its staff to meet changing business goals. Is your firm's library proactively serving the business and the practice of the firm? Are you able to produce meaningful data and statistics to demonstrate the value of the library's services to firm management?

#### **Panel:**

Sandra Campbell, Library Director-North American Region, **Baker & McKenzie LLP**, Ruth Carter Armstrong, Director Library & Research, **White & Case LLP**, Deborah S. Panella, Director of Library and Knowledge Services, **Cravath, Swaine and Moore LLP**

**12:30PM Networking Luncheon**

**1:30PM Case Study**

### **Research Czar: Making Attorneys Better Researchers By Adjusting Their Current Habits**

Most law firms provide only general legal research training and do not address individual attorney needs. What if you could customize your training by showing each attorney how they conducted specific legal research tasks in the past? Through the use of research monitoring software, a "Research Czar" can analyze how an attorney conducted previous research projects, making it possible to provide specific instruction on improving the attorney's legal research skills, point out better search strategies, and identify more effective research sources. Real-life examples and personalized instruction can greatly increase the effectiveness of research instruction, and the efficiency of your attorneys.

Greg Lambert, JD, MLIS, Library & Records Manager, **King & Spalding**

**2:15PM Afternoon Coffee Break**

**2:45PM Panel Discussion**

### **Leveraging the Library While Redefining Your Firm's Value -- Proposition to its Clients**

In the pursuit of excellence in a new economy there exists a very real opportunity for the library to leverage skills and expertise in a continuing effort to improve upon the business model of the modern law firm. As margins compress and pricing models become more flexible, our clients continue to fine-tune expectations. Many firms are reconsidering how they are structured in an effort to deliver services in a competitive and cost-effective manner. How has your business plan changed in light of current economic conditions? Identifying and measuring cost savings has become paramount as many firms are forced to contend with shifting strategic priorities. This critical discussion will focus on many of the increasingly strategic, fiscal and business responsibilities (and opportunities) faced by today's law firm librarian.

- How can libraries and information services contribute to the creation and support of new law firm billing models?
- Assessing the firm-wide (and industry-wide) impact of alternative fee arrangements
- Discerning billable vs. non-billable time
- Tracking on-line expenses to assist in streamlining billing processes
- Justifying costs of on-line services and subscriptions
- Determining utilization as a first step in deriving ROI
- Creating a cost recovery policy & plan
- Working closely with vendors to realize better cost-recovery efforts

#### **Panel:**

Jean P. O'Grady, JD, MLS, Director of Research Services and Libraries, **DLA Piper LLP (US)**, Gitelle Seer, Director of Library & Research Services, **Dewey & LeBoeuf LLP**, Bonnie Fox Schwartz, Head of Research, **Weil, Gotshal & Manges**

**3:45PM**

### **Wrap-Up / Q & A**

As a group we will summarize, synthesize, debate, question and answer any of your "real world" issues as well as determine the coordination and potential resources needed in addressing these specific challenges.

**4:15PM End of Conference**

## Best Practices & Management Strategies for Law Firm Library & Information Service Centers

	Attendee 1	Attendee 2	Attendee 3
Name			
Job Title			
Organization			
Address			
Zip Code			
Phone			
Fax			
Email			

### Signature

I have read the terms and conditions below

- Forum Registration Fee \$795
- I am registering for this event before **January 15th** and would like to claim my **15% early bird discount**—

**Please note: payment must be received in full prior to the event to guarantee your place**



#### Card number

#### Expiration Date

#### Security Code

- Payment in the mail (checks made payable to Ark Group USA)
- Multiple bookings: please invoice separately**

#### Registration conditions

- Registrations can be submitted at any stage prior to the event, subject to availability. A limited allocation is being held and registering early is therefore recommended, in the event of the registration not being accepted by Ark Group the total amount will be refunded.
- Payment must be received in full prior to the course.
- All speakers are correct at the time of printing, but are subject to variation without notice.
- If the delegate cancels after the registration has been accepted, the delegate will be liable to the following cancellation charges:
  - Cancellations notified over 45 days prior to the event will not incur a cancellation fee.
  - In the event of a cancellation being between 45 and 30 days prior to the event, a 20% cancellation fee will be charged.
  - For cancellations received less than 30 days prior to the event, the full delegate rate must be paid and no refunds will be available.
- All registrations submitted by e-mail, fax, or over the telephone are subject to these booking conditions.
- All cancellations must be received in writing.
- Ark Group will not be held liable for circumstances beyond their control which lead to the cancellation or variation of the program.
- Please make checks payable to Ark Group USA.

Ark Group USA will not use your email address or information for any purpose other than distributing our conference and event notices.

### Venue and Accommodations

This forum will take place at the **AMA Executive Conference Center**, New York - located at 1601 Broadway, New York, NY 10019. For information regarding nearby hotels (most within walking distance to the venue) please contact Peter Franken at [Pfranken@ark-group.com](mailto:Pfranken@ark-group.com) or 773.281.4275. We hope to see you there!

### Who Will Attend This Forum?

This highly interactive forum has been researched with and developed exclusively for those involved in managing your firm's library and information resources — including but not limited to Directors of Library Services, Library Managers, Directors of Information Resources & Services, and Directors of Knowledge Management as well as Chief Information Officers, Directors of Marketing, Business Development and Competitive Intelligence.

### Exhibition & Sponsorship Opportunities

If you are interested in learning about sponsorship opportunities for this event, please contact Kevin Klein for more details at [kklein@ark-group.com](mailto:kklein@ark-group.com) or by phone at 708 386 3868

## Best Practices & Management Strategies for Law Firm Library & Information Service Centers

---

**THIS CONFERENCE WILL BE HELD AT:****AMA Executive Conference Center**

1601 Broadway  
New York, NY 10019  
212.586.8100

<http://www.amaconferencecenters.org/new-york.htm>

February 25, 2010— New York, NY



The executive conference center is conveniently located at 48th & Broadway (inside the Crowne Plaza Hotel) in the heart of New York City's bustling Times Square.

---

**Near-by Hotels (within walking distance to the forum venue):****Belvedere Hotel**

319 W. 48th Street  
New York, NY 10036  
212.245.7000 > Reservations

<http://www.belvederehotelnyc.com/>

**Crowne Plaza Manhattan**

1605 Broadway  
New York, NY 10019  
212.977.4000 > Reservations

<http://www.cpmanhattantimesquare.com/>

**Sheraton Manhattan**

790 7th Avenue  
New York, NY 10019  
212.581.3300 > Reservations

<http://www.starwoodhotels.com/sheraton/property/overview/index.html?propertyID=425>

**Marriott Renaissance New York Times Square**

714 7th Avenue @ W. 48th Street  
New York, NY 10036  
212.765.7676 > Reservations

<http://www.marriott.co.uk/hotels/travel/nycrt-renaissance-new-york-hotel-times-square/>

If you would like information on current New York City events, shows, tours, etc., call the New York Convention and Visitors Bureau at 800-NYC-VISIT or 212-397-8222. Or visit <http://www.nycgo.com/> for more information. Tell them when you will be in New York and they will send you information. If you or your family would like a customized tour of New York, we recommend the Big Apple Greeter Program. For a free tour, call 212-669-8159.

---

# Directions and Maps

*AMA New York Executive Conference Center*  
1601 Broadway  
New York, NY 10019

The following can be used as a guide for your visit to the Executive Conference Center, New York. If you should have any further questions, please do not hesitate to call us at 773-281-4275.

## Directions

American Management Association (located in the same building as the **Crowne Plaza Hotel**) 1601 Broadway at 48th Street near Times Square. Entrance is on 48th Street.

### From PENN PLAZA to 1601 BROADWAY (Fastest Route):

1. Going west on W. 33rd St. toward 8th Ave. 0.11 miles
2. Turn RIGHT onto 8th Ave. 0.85 miles
3. Turn RIGHT onto W. 50th St. 0.12 miles
4. Turn RIGHT onto BROADWAY. 0.06 mile **For additional driving directions and maps click here <http://www.mapquest.com/>**

## Transportation

Airport Transportation:

Transportation to/from the airport is available for a fee via Super Shuttle. Upon arrival at the airport, proceed to the Ground Transportation desk located near baggage claim, the Super Shuttle agents there will assist you. For your return trip to the airport, contact Super Shuttle at least 24 hours in advance at 1-800-BLUE-VAN x3. New York taxi cabs are also available and rates can vary depending on the airport.

**These three airports serve New York City:**

**John F. Kennedy International Airport**, approximately 15 miles (estimate one hour travel time) from mid-Manhattan.

**LaGuardia Airport**, approximately 8 miles (estimate 30 minutes of travel time) from mid-Manhattan.

**Newark International Airport**, borders on the cities of Newark and Elizabeth, NJ, approximately 16 miles (estimate 45 minutes of travel time) from mid-Manhattan.

### Parking:

There are parking garages available on 48th and 49th streets, as well as at the Crowne Plaza Hotel.

### Bus:

From Uptown: **M 7, M 10, M 104**, exit at 50th St. and Broadway.

From Downtown: **M 10, M 104**, exit at 49th St. and 8th Ave.

**M 5, M 6, M 7** exit at 49th St. and 6th Ave.

# SUBWAY



To 47th-50th St.-Rockefeller Center



To 50th St. & 8th Avenue



To 50th Street



To 49th Street



To 51st Street

