

NOCALL NEWS

Northern California Association of Law Libraries
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PRESIDENT'S MESSAGE

Dear NOCALLers,

It's hard to believe that my term as NOCALL President is starting to wind down. We'll be meeting during May for both a board meeting and business meeting and then I'll be passing the "baton" to Jocelyn Stilwell-Tong in June. It has been a great year for NOCALL and such a privilege to serve. Our regional professional organization is continuing to improve our effectiveness, financial stewardship, and relevance to our membership. Thank you to the entire board for making this past year so successful!

Last month, we had our annual [Spring Institute](#) held at the Milton-Marks Conference Center in San Francisco. I'm happy to report that it was an enormous success. The theme for this year was "The Changing Face of Technology in Law Librarianship". We were honored to hear the founder of DocketAlarm, Michael Sander, give the keynote address on the emerging technologies impacting the legal market. It was fascinating to see how artificial intelligence, big data, and analytics will potentially impact the legal labor market and how librarians serve the information needs of our patrons. We certainly live in exciting times for our profession! The keynote was followed by our featured speaker, Jamie Baker, on the "The Duty of Technology Competence in the Algorithmic Society". Prof. Baker discussed the role law librarians play in assisting legal professionals to develop technology competency and the trend in state bar associations requiring technology competency among their membership. I was particularly amused with the analogy Jamie Baker made about law librarians being "cockroaches" - we are truly never going away! As our profession moves from print to digital, our role in teaching technology skills to our patrons will only continue to be an increasingly vital task in how we match patrons with their information needs. Please watch your inbox for an email once the videos from these sessions are available on our YouTube channel.

Speaking of YouTube, we are still trying to develop webinars on topics of interest to our colleagues. If you have a project, technology tool, or any other content you would like to share please reach out to our technology cluster (technology@nocall.org) so that we can provide you access to our Zoom account. We'd love to create relevant content for



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our members and show off what we have been up to. We have a lot to share!

I am hoping I will be seeing most of you in DC at the annual meeting for AALL. I know that many NOCALL members will be actively participating in sessions and business meetings. For those new to the profession, I encourage you to attend CONELL on Saturday. It is a great way to connect with colleagues and connect with a mentor.

As we begin preparing for our summer vacations and goals, I would like to remind all of us about the value we receive for our participation in NOCALL. Our

regional professional organization not only provides us the forum to network with our colleagues but helps all of us to stay abreast of developments in our profession. But as a volunteer organization, we are only as relevant as we make it. Perhaps you have a webinar topic to share or the time to volunteer with one of our committees. Think about how you can contribute to our profession via NOCALL. We need your time, energy, and ideas! Law librarianship is in a constant state of flux so it can be overwhelming to stay up to date. Given this, our professional organizations are more relevant than they have ever been. Think about what role you can play and how we can expand our membership.

NOCALL News

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HEADNOTES FROM HOLLY

Holly Riccio
HBR Consulting

VOIR DIRE... I recently had to go to 850 Bryant for jury duty in criminal court, and any time spent in the jury pool is always interesting from both a sociological and a legal standpoint. From what I could tell as a potential juror, the case involved a robbery on a MUNI bus, but what was more interesting were the questions both the public defender and prosecutor asked of the jury pool. The prosecutor posed a hypothetical question of most of the potential jurors about whether they could believe a friend went in the pool if they didn't see their friend go in the pool, but their friend was soaking wet and they saw wet footprints from the pool to their friend. The public defender focused on the charges, asking whether potential jurors could find her client not guilty if the prosecution had to prove six elements and could only prove five. Listening to the questioning from both sides was a great reminder about the power of deduction, and how much they could each say about their case without actually saying it.

MY SAVING GRACE... So, what was my ultimate fate? I was called into the jury box when they were at the point of selecting the three alternate jurors. I answered all of the standard questions (name, occupation, etc.) and then the questions the judge had posed to all of the other jurors before me. The prosecutor asked me a few questions, and then it was the public defender's turn. She asked me about my professional background working as a legal information professional, asking me if I had a law degree, to which I answered no. She then asked if I had any formal legal training, to which I replied (in an effort to clarify and make sure I answered accurately) "Define legal training." One never knows for sure what gets them excused from jury service, but after the judge and attorneys conferred, I heard the best words I'd heard all day: "The court would like to thank and excuse juror number 15."

WHO TELLS YOUR STORY?... My recent jury experience is just one recent instance where I have been reminded of the power of telling a story. Another was a powerful infographic example shared by a law librarian at the Ark Best Practices & Management Strategies for Law Firm Library, Research & Information Services conference. Much of my work now focuses on presenting results, most often made up of a mosaic of details—information, insight, data, recommendations, best practices, etc. I often stop before I dive in to take a step back and think, what is the data revealing, what can the information illuminate...what is the story that is being told? Just imagine if we could all tell compelling stories to our stakeholders about our libraries, departments, staffs and initiatives. Think about the most powerful presentations and speakers you've experienced. It wasn't the data or PowerPoint slides that stayed with you, was it? But those presentations that told a story probably stuck with you.

GROWTH VS. SCALE... I attended my first all company meeting recently and had the privilege of hearing many great presentations from both company leadership and keynote speakers. While there were many takeaways and a-ha moments, the one thing that resonated with me both now—and also thinking back to my time in law firms—is the distinction between growth and scale. While this concept has very specific definitions in the business world, the concept can be—and is—an important one to anyone in a service profession such as ours. There is often a temptation to focus on doing more, but instead of just having a goal of growing services, offerings, or resources, for example, the goal should be to best position your department to achieve what you've defined as success. It's not just growth for growth's sake, but rather growth that can be managed and sustained.

OWNING YOUR CAREER... I always love a great quote, and there were two that stuck with me recently from a panel I heard speak on career development and advancement. First: "Some career paths are like a ladder; others are like a jungle gym." Second: "None of us can outsource or own development."

PROFESSIONAL READING IN REVIEW

Elisabeth McKechnie and Kristin Brandt
U.C. Davis Law Library

“Are You Ready for Your Close-Up? Creating a Library Promotional Video,” by Peter Bremer, *The Reference Librarian*, vol. 60, no. 2, 2019, pp. 117-121.

Gimlet statistics for the Rodney A. Briggs Library showed that despite the availability of email, chat, text, and phone, nearly 90% of library users accessed services in-person. In this article, the author recounts his experience creating a video to more effectively communicate methods of accessing library services to students. The article includes step-by-step instructions and many helpful tips, both for creating videos generally and for using Camtasia multimedia software, the author’s platform of choice. For example, the hardest part of the process was not the software interface, but recording a segment without errors. The author includes specific details, such as Camtasia’s music files and adding closed captioning for accessibility. This article will be most useful for librarians who are using Camtasia software for the first time.

“Unmasking Facebook’s ‘Hidden’ Posts, Photos, and Videos,” by Edward J. Ajaeb, *Online Searcher*, vol. 43, no. 1, Jan/Feb 2019, pp. 28-31.

With over 2 billion monthly active users, Facebook is a prime resource for gathering information about people and their activities. This short article explores ways of uncovering “hidden” Facebook content, including posts and photos that may not be viewable from the user’s profile. The author also lists other online resources for searching Facebook data, such as Bob Brasich’s NetBootCamp.org and Michael Bazzell’s IntelTechniques.com.

“While the Campus Sleeps, Two Perspectives on the Uniqueness of Overnight Library Work,” by Andrew Blakely and Jerrol Mobley, *C&RL News*, Feb 2019, pp. 96-99.

Having spent 15 years as an evening and weekend law librarian, I relate to the authors’ description of how

an academic library changes after hours. The authors work midnight to 8 a.m. at Georgia Tech Library, a 24 hour library. Because the pace is slower, students are more likely to seek individual help and advice. They open up more. The library is quieter and many students use these hours to get things done without distraction. Because of the isolation, the workers are the “face of the library,” a combination of library professional, sympathetic bartender, and father-figure. It’s a more human face than many librarians have the time and opportunity to show.

LET’S TALK CI, SHALL WE? Delia L. Montesinos, Ropes & Gray

WARNING: this is a long article. Like really, really, really long. Grab some coffee and a donut.

CI is my daily bread and as much as I love it, it can also drive me to the most bitter of tears. There are so many pain points! Putting together a report requires too many tools; turnaround times are sometimes unreasonable; the amount of information can drive one to distraction or, worse, be too little to be viable. To top it off, I have to deal with my uber-obsession about delivering the most kickass, ‘trust-me-there’s-no-more-info-to-be-found’ work product—an obsession largely driven by the fact I generate these reports with little or no context: I have no clue how my work fits into the bigger picture.

I know I’m not alone in feeling this way. That’s why I chose CI pain points as the topic of my Spring Institute interactive round table. I hope the session helped everyone feel a bit better about tackling the mad, mad world of CI. What we must remember is that as tech evolves so does CI, and that means it’s always going to be a catch up game. But if we stick together and share our insights we just might get ahead of it sometimes.

Rather than recapping the CI tools I use, I want to put them in context: I will deconstruct a Company Profile and show you how I work. First, some disclaimers:

- Previously, I worked exclusively within the labor and employment realm. At present, my work focuses mostly on corporate, securities, and investments. I mention this because lots and lots of great tools will not be mentioned here. For instance, I just saw a demo of MarketLine; looks great but it's not mentioned because I am not familiar with it. Same goes for Thomson One, for CB Insights, and for other great tools.
- There is no right, wrong, or magical way to put together a CI report. This is simply what works for ME and I hope to learn new tips and tricks from all of you.

IMHO, the most important part of a CI report is the template, because it directs your research. My firm has tons of templates for company profiles, each designed to fit a specific business type/industry focus. Rather than searching for the right template each time, I have combined all of them into a single multi-purpose template. When the report is done, I simply delete the unused sections. This not only saves me from poking through iMangle to find the right template but, more importantly, it helps me think outside the box. Case in point, a recent profile I put together on a private equity firm. The PE template does not have a section for patents but, because mine does, I thought to check and voila! I found some.

The first thing I do is browse through the company's web site, to acquaint myself with the business and to mine data: I get contact info, grab interesting tidbits and paste them into the report, bookmark pages that might be useful later, etc. Next, I tackle the last two or three annual reports (or the 10-K if there's no pretty investor version) and the latest investor and conference presentations. There's a TON of info you can get from these docs: business descriptions, product/pipeline lists, patents, regulatory investigations, litigation, strategy, etc. Plus you can find some really sweet images to liven up your report. FYI, at this point I'm just grabbing info versus trying to work it into a narrative.

The first section in my template, **Company Overview**, is truly the final section because I don't write it until

I'm done with everything else. Instead, I 'dump' any interesting or VIP info I come across while working on the other sections. Obviously, this means the Overview is a HUGE mess by the time I get to it. But it also means I now have a complete picture of the company in my head and I can assemble all those tidbits into a killer executive summary. That said, if you prefer to use an already-written business overview you can grab one from SEC filings (10-K and ADV), Pitchbook, S&P (CapitalIQ, Bloomberg, and a few others get their info from S&P), D&B/Hoover's, or even Wikipedia (use only vetted info). Either way, don't rely solely on a company's About Us page; it's full of PR spin. Lastly, if the Overview could benefit by the inclusion of a company history, e.g. when the business strongly identifies with the owning family, check Gale's Business Insights: Global, which is free through the SFPL business databases.

Next, I jump to **Company Deals**, which includes M&A, VC, PE, and all other types of investments. Putting together a deal list is mind-numbing work so I am not sure why I enjoy it so much. The biggest pain point is finding legal counsel for deals, which is why I always start with Pitchbook: you can include counsel, aka Service Providers, as part of the excel download. Sure, there are some things I don't love about Pitchbook: how you have to toggle between profiles to make sure you don't miss anything, how you have to export investments and exits separately, how Service Providers includes all advisors and not just the counsel info I need. But, honestly, dealing with these annoyances is faaar less painful than poking at every single deal to find the advisors, as you have to do with other resources (I'm looking at you, CapIQ). That said, once Pitchbook data has been downloaded and cleaned, I do poke through CapitalIQ, Preqin, and Mergermarket to fill in the gaps, for both deals and counsel. And when working on the News section I keep this section in mind, in case I come across any additional deal or counsel info.

After deals are wrapped up, I fire up TotalPatentOne and head over to the **Patents** section of my report. TotalPatent is not my favorite tool in the world—it

feels so very clunky—but it’s a million times better than using the USPTO web site or Google Patents, namely because counsel info is clearly listed. I also like the fact you can export info into a spreadsheet; this is rather handy if you have to include a busy-bee’s entire patent history, or if you need to manipulate the data and create pivot tables/etc. For litigation I use Docket Navigator because their level of tagging and their date coverage is the best, hands down. I’ve heard the grumbling about the new platform but, as I never used the old one, I can’t comment on what ‘was’ versus what ‘is’. My only complaint is that for counsel they use one row per attorney per case, which means I have to clean lots of data in order to display all info for a case in one single row. Ah! When using Docket Navigator be sure to use the advanced search instead of the quick profile, namely so you can grab all name variants and subsidiaries. To finish up this section, I usually head over to either Lex Machina or BLaw to grab patent litigation analytics, especially their awesome charts and graphs.

Company Financials is next. Don’t love it but it’s super-easy to compile if the company is public or has to submit regulatory filings; for private companies, not so much.

Public companies: The most important thing to remember is this: with few exceptions, the end-user will know beans about financials so include as many graphs/charts as possible. Beyond the investor/conference reports I mentioned earlier, Pitchbook is my go-to because its charts are clean and easy to read, and I like the fact that I can download detailed info (income statements, balance sheets, cash flows) as excel spreadsheets. No Pitchbook? Try Bloomberg, CapIQ, or Mergent (the last one free via SFPL). To recap financials in narrative form I rely on the latest earnings call or, better yet, an analyst report. You can find call transcripts in Bloomberg, CapIQ, Motley Fool, and Seeking Alpha, to name a few. Analyst reports can be found in Bloomberg, CapIQ, Mergent, Morningstar, and Value Line (the last three free through SFPL). Need a SWOT? You could write one, or you could fish for one on the web, but why waste valuable

time? Instead, head over to SFPL’s databases and find a vetted SWOT in Morningstar, or Gale’s Business Insights: Global. Looking for credit ratings? Turn to Bloomberg, CapIQ, or Mergent. Seeking stock info? Although info is readily available on the web, I turn to Pitchbook because with a single screenshot I can grab price/trading volume/etc., as well as the analysts’ forecast and the Morningstar rating. I supplement this image by pulling a list of top institutional holders from Yahoo Finance or CapIQ, as well some info about the IPO.

Money manager/investment firm/etc.: Form ADV (free from IAPD web site) is your best friend. Start by reading the business description in Part 2 to identify any parents or subsidiaries, as you might need their ADVs to get a more complete picture. In Part 1 you will find assets under management (AUM), as well as AUM by type of client. You should also scan the form and see if there’s any other financial info you can grab, like the number of advisors/brokers they have or the exposure of their separately managed accounts [we’ll discuss funds next]. You can also check Pitchbook and Preqin for other fun tidbits, like dry powder, median round amounts, etc.

Private companies: lolololololololol. Best you can hope for is that a database will have an estimated revenue range. Definitely check the usual suspects (Hoover’s, D&B, Pitchbook, CapIQ), but also try Reference USA (free through SFPL) and, if you have access, Investext (part of Mergent but not available through SFPL). Truth be told, I’ve had better luck finding revenue/financial info from stories in local newspapers so my suggestion is to work on this section at the same time as you do the News. And don’t ignore fluff pieces! That article about a company’s 50th anniversary party could have some financial info buried in the narrative.

I kinda hate the next section, **Funds**.

- Pain Point 1: CapIQ, Pitchbook, Preqin, and the Form ADVs have this info but it’s limited to private funds. Morningstar has info on EFTs and hedge funds. Typically, public fund information is also

listed on a firm's web site. Thus, to get a complete picture you MUST check all sources. Lovely.

- Pain Point 2: If you thought getting counsel info for deals was fun, wait until you have to find counsel for funds. Look, I totally get that these products are designed for asset professionals and not law firms. And I understand that counsel info is not always available (though I can usually come up with a pretty good list if I check all the databases plus news). But, let's face it, we're law firms: what we truly care about is finding out who we're up against when we pitch a client. So what I'm saying is this: vendors, could you please please please be sure to include counsel info? I cannot emphasize enough how important this info is to law firms.
- Pain Point 3: Next, I get to organize the fund info I found, aka give myself a massive headache. Do I list the funds as open versus closed, private versus public, PE vs hedge vs REIT? I obviously can't clump them all together. Namely because even if I wanted to, it's simply not an option: each resource lists data differently so you can't simply slap a fund from Preqin into the spreadsheet you downloaded from Pitchbook because the fields don't match. ARGH. Kill me now.

The **Litigation** section is here. Ugh. Been trying to come up with something nice to say about this section and the best I can do is, "Well, at least it's not the News section." The first question you need to ask yourself is: how in-depth do I need to go? Meaning, how much time do I have for this? If you don't have a lot of time, pull quick litigation reports from Monitor Suite, Lexis Courtlink, or BLaw. I prefer Monitor Suite because I can download the case list as an excel spreadsheet; just don't forget to expand the company list to find name variations and be sure to choose Dockets only, lest you end up with incorrect case count/duplicate info. Then again... date-wise, Courtlink goes back much further so when I need more than five years of litigation history, off to Courtlink I go. TBH, I rarely download the BLaw report because it's not only a PITB to have to print each section/chart type separately but I also have to

remember to select "print all pages" each time. As you can see, there is truly no clear winner for printing a quick litigation report: your call as to which report to use, and proceed at your own risk.

If you have time, or must provide an in-depth history, you're going to have to touch every single database to a) get a complete list of cases and, more importantly, b) get a counsel list, 'cuz Courtlink doesn't list counsel by case and Monitor Suite's batting average for counsel info is wanting. Y'all are pros at this, litigation history is a common reference question, so no need to list all the databases you should consult. Instead, I will share a couple of tips. First, stats are everything right now: use Lex Machina or BLaw to add some images and put the litigation in context, especially for class actions. Second, don't forget about the smaller databases: I always start with Courthouse News and then add info from other places. Why? Well, complaints are CNS' lifeblood so I trust them more than anyone else to capture this info—it's the perfect starting point for any litigation history, although you'll have to find counsel info elsewhere. Plus, how awesome are the CNS case summaries?

It's here: the **News** section, my nemesis. I can't even with this section. First of all, I don't care what anyone says, there is no good resource out there: they are either too targeted or include everything but the kitchen sink. Second, there are TONS of proprietary news sources that are not indexed anywhere, like The Deal Pipeline or Mergermarket, both of which I use on a daily basis. Third, let's pretend there's a magical aggregator that indexes every source and allows you to Boolean and taxonomy and filter down to the just news you need: BAM! You hit a pesky paywall! And now I'm really mad because I do subscribe to that source but I can't access it through the third-party vendor, and this means I'm gonna need to head over to that source and run the same darn search all over again. Nope nopety nope nope no.

So until the mythical unicorn of news aggregators comes along—and for the record, I'm not holding my breath because I fully realize it's pretty darn

unfeasible right now—the only recourse is to either plow through all the miss-hits you get from databases/aggregators or check each source individually. I opt for the later, so this is how I tackle news:

- Law360 and Law.com are a must. Anything reported by these two sources should go in the news section. If you have access, you should also run a BNA newsletter search.
- Firm-specific sources: Meaning, whatever you access via direct subscriptions. For me, it includes The Deal, MLex, Mergermarket, Creditflux/Debtwire/etc., a huuuuuge list of private equity/funds newsletters, and WSJPro, to name a few, and I often switch to the Google search page/domain for that country to run a news search.
- The big five: New York Times, Wall Street Journal, Financial Times, Bloomberg, and Reuters. When researching a foreign company I always add the top newspaper for that country, using Google Translate as needed.
- Local papers: I use the SFPL's Regional Business News (EBSCO), which includes the Business Journals and Crain's. This is where I typically find financial info for private companies, as well as gossipy tidbits about key execs.
- Additionally, I check the top industry-relevant news sites; e.g. FierceBiotech for a biotech company, Becker's for a health system, etc. And I always end with a quick scan of the company's news page: I know what I said about PR-spin earlier but it's worth checking to make sure you didn't miss anything super important.

Do you see now why News is my Voldemort?

OK, that's a wrap! Obviously this article doesn't include all the sections you might cover in a CI report. For instance, I've left out Key Execs (company web site, LinkedIn, SEC filings), Licensing Agreements (Strategic Transactions, Form 10-K), Product List (company web site, CapIQ), Product Pipeline (Company web site, 10-K), and Competitors (Hoovers, CapIQ), to name a few. But this has gone on long enough, so I will leave them for future columns and

instead will give you one last tip: When you can't figure out which database has what info, head to your favorite biz school library web site and check out its research guides. I have become rather attached to the one at [Cornell SC Johnson School of Business](#) but, locally, [Stanford](#) and [Berkeley](#) have great subject guides.

REMEMBERING DONNA PURVIS NOCALL Memorials Committee

Leslie Hesdorfer, Jane Metz, and Donna Williams

As many of you have heard, former NOCALL member Donna Purvis passed away on February 7, 2019. Her absence is felt by many friends and colleagues in the law library community. The full obituary can be found [here](#), and memories shared by current and former NOCALL members are printed below. NOCALL has made a contribution to the UC Berkeley School of Information in Donna's memory.

- *From Nora Levine:*

Donna enjoyed a prolific career in law librarianship, spanning more than thirty years. She began in the pre-technology era at Brobeck, Phleger & Harrison. She moved from there to The Bank of America Law Library. She was the Library Manager at Baker & McKenzie, and the Firm-wide Library Manager at Morrison & Foerster. She retired in 2011, from her final position as a Library Relations Consultant at LexisNexis.

In addition, Donna was deeply committed to the larger law librarian community. She was a Past-President of NOCALL, a Member at Large, and held multiple Committee Chairs over the years. She was a Past Co-Chair of the PLL Education Committee for AALL and a presenter at AALL. She focused on the importance of proving the value of law libraries (and librarians) to firm management, and we couldn't have had a more ardent spokesperson. She was a frequent

speaker at PLI educational seminars, a past member of the West Advisory Board and the Head Librarians' Group.

Donna had a smile that could and did light up any room.

In retirement she enjoyed travel, her beautiful home, and lazy days on the Delta with her husband Jim and dog Lulu. She loved her position as Commodore at the Marin Yacht Club and being involved in the boating community.

Memorial services were held in San Rafael on March 23, 2019. The family suggests that any memorial contributions be made to the San Francisco Opera or to the University of California School of Information in Berkeley.

- From Joan Loftus:

I've known Donna for many years as a colleague and as a friend. One of the best things about her was that she was always willing to go out and do, or try, something new. There were great trips to AALL conventions (red eye to D.C. so we could be at the July 4th celebration!), Pinecrest, the Delta, and lots of shopping and lunches. Donna was always a bright light wherever she went with her sparkling eyes and welcoming smile. Her laughter and optimism will be missed, but the memories will remain. I am so blessed to have been able to have had her in my life. Smooth sailing Donna!

- From Jo Caporaso:

Donna was a close friend, and colleague who loved life better than anyone else I know. We met while working as librarians at Bank of America and our relationship continued long after. In addition to admiring her successful career it was her personal qualities that impressed me the most. Donna was kind, generous, wise, beautiful, cheerful, helpful, sincere and courageous. She was all of these and much more. Her outgoing nature made everyone enjoy being with her. Her final gift to her friends was

a reminder to enjoy each day. I count myself very fortunate that she was in my life and I will forever miss her.

- From Sandra Sawyer Pazos:

Donna was the best friend anyone could have. She was one of my dearest friends. Our paths crossed in the late 70's when we were two young women beginning our professional law library careers. Through the years we've shared our dreams, adventures and our major life moments. Donna always sparkled on the outside but her true beauty was on the inside. Our story has come to an end much too soon. I will always treasure and carry her beautiful spirit within me.

- From Joanne Scala:

Donna was the first NOCALL librarian, and the first person that I met in the Bay Area. She interviewed me in December of 1998 for the Palo Alto Librarian position at Baker & McKenzie. It's hard to believe that 20 years have since passed. On my first day she worked with me in Palo Alto and the next day I went to SF for the day. I remember her driving directions, "Take 280, it's beautiful with rolling hills. 101 is ugly with lots of trucks."

Donna was always cheerful and optimistic, even in the face of adversity, she was a joy to work for and with, and I very happily followed her to Mofo in SF. We spent time together outside of work as well (in SF, San Rafael and Carmel, too), with and without our dogs, and she was there to comfort me when I needed it on numerous occasions.

NOCALL was not the same when she left librarianship for LEXIS and later retired, and we will always miss her.

- From Diane Rodriguez:

Donna was one of the first NOCALL people I met too, as a fledgling library assistant at the Bank of America legal department where I worked with Mr. Purvis, who is also a wonderful person. I will always remember her warm enthusiasm and I must say I

truly admired the leadership duo of Donna and Jo Caporaso... I thought if I could be like them someday I will be a happy librarian! She was wonderful.

- From Mary Staats:

For those of us who are part of the "Old Guard," the ones who were fortunate to have worked in the Golden Age of Law Firm Librarians, Donna was especially helpful. In those days long before the internet and email, we used the phone. Donna was such an indispensable resource for banking questions and materials while she worked at Bank of America. Then when she went to Baker & McKenzie, she was equally as knowledgeable on international resources. She was a member of a local administrative law firm librarians group formerly known as the Head Librarians' Group. We would meet once a month at lunchtime and we used to have an annual retreat to discuss pressing issues that required more time than an hour to discuss. On three or four occasions, Donna offered the Corinthian Yacht Club through her husband's and her membership. Those days when we could actually take a whole day away from our offices to go to a tranquil venue to discuss a variety of issues, get new ideas and feel the support of our colleagues. They were really useful and could not have happened without Donna's help.

One of my favorite memories of Donna is the day of the earthquake, October 17, 1989. About 5:30 Donna, Joan Loftus, Jo Caporaso, NJ Thompson and I were all on the airport shuttle on the way to LAX. We had all attended a PLI Law Librarians Conference. The driver of the shuttle told us there was a big earthquake in the Bay Area and that the Bay Bridge had come down. When we got to the airport, no planes were going to Oakland (obviously) and there were some planes headed for Concord. Some of the other attendees of the conference were able to get on the Concord bound planes, others headed for Sacramento. The five of us were going to wait around for later planes to Oakland, but then the airport closed entirely due to fog. So we five tried to find a hotel with room. As you can imagine, most were full. We finally found a room where we five would share a king-sized bed

and a rollaway. We had no idea what to expect when we returned home. The news on the TV made it sound like everything had been devastated and that there were fires burning throughout San Francisco. I managed to get through to my 15 year old daughter in Berkeley and told her to go stay with neighbors as I would not be back until the following day. The night at the hotel was like a teenage slumber party, four of us on a king-sized bed and one of us (Joan, I think) on the rollaway. We talked and laughed almost all night. And it was Donna who kept us laughing and distracted from the earthquake and its damage.

Donna faced some challenges in the years that I knew her, but I found out about them only because others had told me. She never spoke of any of these things and she always had a positive, cheerful outlook about everything. And I am unable to picture her with any other face but a bright smile. She certainly enriched my life both personally and professionally.

- From Donna Williams:

I am going to miss Donna's smile and bubbly personality. I had the great pleasure of working with her when she was the NOCALL President and I was the Secretary in the mid 1990's. I learned so much from her on how to run meetings; she kept a tight ship, which everyone appreciated. She was respectful if people went off topic but she was able to pull the conversation back so a decision could be made and our time wasn't wasted. We kept in touch at NOCALL and AALL events throughout the years. She is one of those people that everyone had the utmost respect for. We always would laugh about our "Jim's" as my husband is a Jim as well. Seriously, to have another couple as Donna and Jim was pretty unique. I will miss Donna but her legacy will live on through all the people she's been in contact with, mentored, and assisted over time.

SCALL SPRING INSTITUTE REVIEW

Ramona Collins
Berkeley Law Library

I was honored to represent NOCALL as a VIP guest at the [SCALL Institute](#) in Santa Barbara this past 22nd and 23rd of February. The theme of the Institute was AI/Machine Learning Demystified, and I really do feel like I came away from the [program](#) with a better understanding of this emerging and important field.

In the opening talk, Prof. Matthew Turk from UCSB gave a very accessible introduction to what Artificial Intelligence and Machine Learning are. Defining “intelligence” and “natural” versus “artificial” is actually a deep philosophical exercise. Prof. Turk was followed up by Prof. Richard Re from UCLA who gave some examples of how AI could be used in the criminal justice field. This was the session where we explored how bias in the data can be extremely detrimental. Prof. Re also presented a dystopian/Orwellian view of what criminal justice and incarceration might look like in the future. Jean O’Grady, the AALL VIP guest, brought us back to earth with a presentation on AI as an opportunity for librarians to evaluate new resources and be part of the discussion of how to use them most effectively. All the background information and real-world examples presented in the first day of the Institute set the stage perfectly for the panel of researchers from LexisNexis, Thomson Reuters and Bloomberg Law. SCALL members June Liebert and Erik Adams moderated the panel and asked probing questions. I was so engaged in the discussion I didn’t take notes – something I regret now that I’m trying to review the program for you. I do remember a robust discussion of protocols around experiments and protection of customer data.

I’m happy to say that SCALL’s Past President, Ramon Barajas, will join us for our Spring Institute this coming March 22. Our chapter is only stronger when we network and collaborate with our other California local chapters.

INFORMATION ARCHITECTURE IS FOR EVERYONE

Sarah Lin, Singularity University

How to Make Sense of any Mess, by Abby Covert (ISBN 978-1500615994; 174 pages)
\$23.75 on Amazon: https://www.amazon.com/How-Make-Sense-Any-Mess/dp/1500615994/ref=sr_1_fkmrnull_1?crid=MCUW5SYI1HBF&keywords=how+to+make+sense+of+any+mess&qid=1552318218&s=gate+way&sprefix=how+to+make+sense%2Caps%2C292&sr=8-1-fkmrnull

Is information architecture (IA) for everyone, or is it just for systems or technical services librarians? After reading Abby Covert’s *How to Make Sense of Any Mess*, I believe more firmly than ever that IA is for everyone. If you think that IA has nothing to do with your job, you need to read this book. Hopefully by the end of this review, you’ll agree with me and quickly put it on hold at your local library or put in a purchase request.

No matter your position in your library or institution, you surely deal with messes on a daily basis. Covert defines a mess as “any situation where something is confusing or full of difficulty” (p11). At my previous job as a law firm librarian, we had messes like trying to capture attorney experience (solving questions like, “Does anyone know a lawyer who practices X in Y jurisdiction?”), ensuring relevant dockets get filed into the proper matter folders in our document management system, archiving purchased articles and cataloging satellite libraries in foreign languages. These days I have more fun migrating database content, determining asset licenses, teaching about copyright and process mapping my company’s IP framework. We all work in different aspects of information delivery and your information messes will differ from mine; Covert’s approach is a clear 7-step approach to figuring out a problem, making a map to fix it, and then acting on that map.

Chapter one is Identify the Mess. Covert encourages shining a light on the full extent of the mess—right

out to each edge and corner, including everyone and everything that's involved. I'm often discouraged when a small mess uncovers more (or lots more) messes, but Covert reminded me that until you know the full scope of what you have to fix, any solution will be insufficient. She advises drawing a picture of the mess and establishing the big picture as a baseline for the rest of the chapters. I appreciated her description that messes come from either too much, too little or not the right information, or some combination of those. Under that rubric, it is easy to see how IA could be applied to so many messes encountered in a library.

Chapter two is State Your Intent. This chapter isn't about what you're going to achieve by cleaning up the mess as it is establishing the guiding principle by which the remaining logistical decisions will be viewed. Covert asks us, what is 'good' for your user? Here it's important to elaborate that she means what the user thinks is good, not what would be good for the information architect. This underscores her repeated point that words matter. Keep this in mind as you move through the rest of your intention, looking at Who matters, Why it matters, then on to What matters. Finally, with How, you need to explore all possible methods to achieve your intent. In reality, options abound and there is no one way to achieve your stated intention; indeed, each aspect of a solution has possible variance.

In keeping with a groundedness in reality, chapter three is called Face Reality. This is my favorite chapter because it's the one I bring myself back to day after day. Covert reminds us to face our reality at every single level of the mess: the players involved, factors affecting the mess, the content surrounding the mess, and the channels through which information is transmitted. The players includes a wide arc of interested parties: users and stakeholders are obvious players; additionally Covert asks us to include potential users as well as distractors. I found that including these two players broadened my view of both the mess as well as made me go back and review my intent. Once I did so, Covert's admonition to get comfortable with all types of diagrams and find one

to map out what is actually happening with your information mess. I am currently loving the Journey Map, but most of us have probably used some of her suggestions from time-to-time; it's good to remember that drawing a different kind of map can help you see your mess from a new angle.

After three chapters fully reviewing the situation, chapter four brings action with Choose a Direction. Choosing your direction means deciding what you are going to make—what that place is and the words & relationships (ontology) that are going to get you there. This is also where you figure out Who does What. I found Covert's listing of words that you would say juxtaposed with words you would not say to be quite illustrative. In my current company, there are words that have certain meaning, and being clear on those—either using those words or not—helps shape the narrative and bring in stakeholders.

Once you know which direction you're headed, it's time to figure out the distance you need to travel to get there, which is chapter five: Measure the Distance. I love to buckle down and start a project, yet here is where Covert reminds us that it's all about the indicators that let you measure your progress towards your destination, but also how you will know things have changed. You really can't without some baselines along each axis of your mess. The two points I highlighted in this chapter are that first, there is no right way or wrong way to do this, and second, we must be 100% realistic with regards to what we can actually accomplish given the reality of our lives. I confess that this is the most difficult element for me, and hope I'm not alone!

Chapter six is entitled Play with Structure, and it hearkens back to Covert's point that there isn't a right or wrong way to make sense of your mess. In fact, being able to play with the sequence of the project, the way you sort it, the hierarchies you map is key—play is the operative word that guides you to put aside preconceptions and let the optimal road forward emerge. This point suggests that if at first you don't succeed, play around until an alternative presents

itself. In the start-up culture in which I find myself at my current employer, the resilience required to enact this kind of persistence has turned out to be a skill worth developing.

The final chapter is Prepare to Adjust, and by this she means both your plan and your mindset. Often prone to despair when faced with institutional roadblocks, I found Covert's point that progress IS possible to be the best kind of reframing. This step involves user and stakeholder feedback, which could very well precipitate the need to tweak or adjust or pivot or change course. Indeed, Covert seems to think that this is necessary--that while it's easy to find unanimity when you're designing by yourself, you don't actually start to practice information architecture until you engage and react to your users. Covert uses the metaphor of a coffee filter, admonishing users to be the filter that ideas flow through to become palatable. As librarians, we have expertise that fills a gap our stakeholders need, but we need to react to and improve upon the needs they have rather than operate as a silo.

Covert concludes with two linked ideas: that information architecture is hard, but that it's also very rewarding. I couldn't agree more and I hope that this detailed summary is enough to convince NOCALL members that Covert's book is worth reading no matter your role in information delivery and no matter your employer. Happy architecting!

E-READER BOOK REVIEW

Elisabeth McKechnie
U.C. Davis Law Library

*Book prices will be listed where available; All prices are accurate as of writing date and may have changed by the time this column goes to press. Books are sourced from Amazon.com unless otherwise noted.

This edition of the E-Reader Book Review is dedicated to Libraries and books, in honor of National Library Week. There were a number of titles I wanted to add but the prices had shot up by the time I started drafting this column, and they no longer complied with my \$3.99 or less rule. So here are my picks for this month.

[The Books that Changed My Life](#) by Bethanne Patrick
Price: .99
Source: Amazon.com
Format: Kindle

Books are important to us, or we wouldn't be librarians. In this book, a variety of people were asked what book had changed their lives. Those questioned varied from celebrities like Eric Idle and Mayim Bialik to writers like Margaret Atwood and Judith Martin (Miss Manners), to our favorite librarian Nancy Pearl and many, many more. In all, 100 people gave the author their feedback and recommendations for the most influential book they'd ever read. Given the Amazon price, it's a bargain.

[Checklist](#) by Marion Zimmer Bradley
Published: 1960
Available: Project Gutenberg, <http://www.gutenberg.org/ebooks/39184>
Price: Free
Format: Kindle, EPUB, HTML

Librarians are famous for their annotated bibliographies covering a variety of subject areas. Bradley, later to become a well-known science fiction author, compiled a daring bibliography at the end

of the repressive 1950's listing all materials then-available of lesbian, variant, and homosexual fiction in English or in English translation, with supplements of related material for the use of collectors, students and librarians. This includes films and poetry. Those interested in the history of queer literature will find this of interest.

[Lessons in the Art of Illuminating](#) by W.J. Loftie

Published: pre-1911

Available: Project Gutenberg: <http://www.gutenberg.org/ebooks/40423>

Price: Free

Format: Kindle, EPUB, HTML

This is a how-to guide on illumination, using classic examples to guide the novice illuminator in recreating medieval masterpieces. The plates are in color and beautiful. When I was in high school and calligraphy a hobby, I would have killed for this book! It discusses inks, pens, and how to modify a steel nib for the work. Each plate is individually described. And even if you don't plan to use the book to illuminate, there are black and white outline plates to be printed out and colored with pencils! Read it in HTML if nothing else to see the art.

Librarians on Horseback

[Eight Mules from Monterey](#) by Patricia Beatty

Published: 1966

Available: Amazon

Price: \$2.99

Format: Kindle

This fun children's novel describes the early Monterey County Library's system of book delivery on mule-back. The narrator's mother, a new librarian, takes on a summer job establishing small libraries in the Santa Cruz mountains above Monterey during the summer of 1916. She brings eight mules, a load of books and her children on the trip and meet with a variety of adventures in the process. The book is based on the adventures of Monterey County's first librarian, Anne Haddon, who travelled on horseback to deliver books and start libraries. See: [Smithsonian Magazine](#).

Companion Volume:

[Books for All, Monterey County's First Librarian](#) by

Barbara Ann Warren and Anne Haddon

Published: 2012

Available: Amazon

Price: \$2.99

Format: Kindle

This biography is based on Anne Hadden's partially written memoirs, fleshed out by her grandniece. Hadden does have some interesting observations, although her niece needs a good editor. It is full of photos and documents from her time as head librarian in Salinas.

Spotlight on...

Julie Watters

How did you choose law librarianship as a career?

I've actually just come back to librarianship after a 12 year hiatus. I really missed it. Back in law school, some of my friends worked in the law library and I always liked being there at the reference desk. I was a Lexis representative during my last year of law school. We didn't even learn online legal research until our 2nd year back then. When I came out to California, I worked for Lexis in large San Francisco and Silicon Valley law firms including Wilson Sonsini. Then I briefly lived in Texas and thought about applying to UT for library school. I was working in Houston though and the library school is in Austin and as a New England Yankee, I knew I couldn't stay in Texas. I came back to the Bay Area and worked for Knight Ridder Information teaching people how to do patent and trademark research on Dialog. Wilson Sonsini was again one of my accounts. Liza MacMorris asked me if I wanted to be a reference librarian at the firm. So I owe my start in law librarianship to Liza.

What have you enjoyed the most from being involved with NOCALL?

I've enjoyed reconnecting with colleagues I haven't seen for a long time and meeting new ones. I have really enjoyed the NOCALL social events like the RBG event at the Roxie Theater and the Trivia Night at the San Francisco Law Library. At both events, I brought a non-librarian friend along with me and everyone was welcoming and great.

Aside from the basic necessities, what is one thing you can't go a day without?

I cannot go a day without interacting with a dog. I have 2 dogs of my own so when I'm at home, that's not a problem. But when I'm traveling, I proactively look for people walking their dog(s). I will ask if I can pet the dog, engage in small talk about the dog and usually end up taking at least one photo of said dog. If the dog is a Pembroke Welsh Corgi, like my own, then there's a lot to talk about and my day is made. I once ran after a family in Frankfurt that was walking a Corgi through a crowded square. I literally jumped up from our table and ran through a crowd to reach them. We'd been on vacation for a couple of weeks in France. French dogs are somewhat aloof and I hadn't seen a Corgi the whole time we were there. Luckily the family was very nice and even though they didn't speak English very well they understood that I was a Corgi person.

What do you consider the perfect meal?

To me, the perfect meal is more about the company you're with, the conversation you enjoy, the expectations you have and where you are. If you're someplace new the likelihood of a perfect meal increases. My husband and I went to Corsica on our honeymoon many years ago. This was long before cell phones and Wi-Fi were ubiquitous. We were there in April and many places had not yet opened for the season. We read about a restaurant in a guidebook described as "in a remote region of Corsica" but after a long drive on narrow, windy roads, it was not open. We ended up in a bar in the small village nearby. It was full of old men who were drinking Pastis, smoking cigarettes and playing boules. We were very hungry and asked the barmaid, the

only other woman besides myself, what they had to eat. She said something about omelette avec jambon et fromage. We said "Oui". She seemed delighted to have some patrons who cared about a meal more than just another drink. Much to our surprise, we got a hearty meat stew, some roasted vegetables and freshly made crepes with Nutella for dessert. As we had no expectations of this establishment, this was a perfect meal.

What was the last book you read that you really enjoyed and why?

The last book I really enjoyed was ***The Library Book*** by Susan Orlean. She is such a talented writer that I once read an article in the New Yorker that she wrote about a taxidermy convention at Madison Square Garden and it was fascinating. I'll read anything that she writes. I also did not know anything about the fire at the Los Angeles Public Library in 1986 before reading this book. Orlean tells the history of the library and of Los Angeles itself in her most masterful storytelling style.

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UPCOMING EVENTS

For more details, see <http://www.nocall.org/>