PLLIP-SIS ANNUAL REPORT 2016-2017

BOARD MEMBERS

Members of the 2016-2017 Private Law Librarians & Information Professionals – Special Interest Section (PLLIP-SIS) Board were:

- Cameron Gowan, Chair
- Elaine Egan, Chair-Elect
- Mary Ann Wacker, Secretary
- Laurel Evans, Treasurer
- Liz Whittington, Member-at-Large
- Michelle Tolley, Member-at-Large
- Scott Bailey, Immediate Past Chair

COMMITTEE CHAIRS

- Awards: Saskia Mehlhorn
- Bylaws: Caren Luckie
- Communications: Andrea Guldalian
- Education: Jennifer Berman and Jim Senter
- Annual Meeting Planning Committee: Julie Pabarja and Lucy Curci-Gonzalez
- Grants: Leanna Simon
- IP: Sarah Mauldin
- Membership: Alana Bevan
- Nominations: Kim Serna
- PLLIP Summit: Alicia Pappas and Jeremy Sullivan
- Small and Medium Law Libraries: Sandra Dunbar and Kathy Coon
- Strategic Directions: Laurel Evans and Mark Gediman
- Value Task Force: Scott Bailey
- Web Site: Linda-Jean Schneider and Kevin Miles

STRATEGIC ACCOMPLISHMENTS

WORK OF ELEVATION TASK FORCE – ELEVATION TASK FORCE PARTNERS WITH BILL KAMPER OF SIMPLIFIED SOLUTIONS

CURRENT CHALLENGES

- Due to financial or business pressure, private law firms are beginning to look at outsourcing certain legal research efforts to 3rd Party service or just downsizing
- Negative or outdated perceptions regarding internal legal research or library services
- Other internal departments like IT, marketing or accounting are beginning to encroach on traditional areas of expertise causing a lack of clarity and ownership
Lack of collective and consistent view or messaging from law firm to law firm. We are not singing off the same music sheets yet.

Technology Disruption: Don’t need the bodies and the books

**The Opportunity:** To promote the value of private law firm librarians to the law firm C-suite and our own community with a consistent message

**The Strategy:** Develop and implement a multi-channel Content Marketing campaign that defines and leads the conversation by promoting thought-leadership around our value as a core strategic resource, financial asset, and competitive advantage.

**Town Hall Meeting December 16, 2016** – A Town Hall Meeting was held with Rich Leiter and the PLLIP Board. There were over 250 participants on the call. The Board hopes to continue with Town Hall meetings.

**PLLIP Taxonomy Project** – In an effort to achieve its current strategic goal of liberating resources from silos and making them readily accessible to all members, AALL have begun revamping its Knowledge Center. The revamp of AALL’s Knowledge Center includes an overhauling of the search and taxonomy. To ensure the needs of all members and Special Interest Sections are met, AALL have asked PLLIP to assist with reviewing and updating a list of taxonomy terms for our SIS. We have updated the list with the most up-to-date and relevant terms that fit within the scope of working in private law firms and corporate libraries.

**MEMBER SURVEY**

1. Our members want to keep up! 94% of you want continuing education opportunities. 88% are looking for connection and community and 77% of you enjoy our networking opportunities.
2. Education You overwhelmingly appreciate the PLLIP Summit and education webinars the most out of all of our activities.
3. PLLIP Summit Of those of you who responded to our Summit questions, 87% said it exceeded your expectations.
4. Bring back the Newsletter? Nearly 40% said you valued the newsletter. We are reviewing our various communication outlets in committees now.
5. You are busy! You want more frequent and less demanding ways to assist our PLLIP committees.

**Updated Strategic Plan** – PLLIP’s Strategic Directions Committee compiled a focused and concise list of objectives, goals and outcomes as far as Knowledge (professional development), Leadership (becoming recognized experts in our field), and Community (meaningful engagement).

**By-Laws Change** – Membership approved a small change regarding Committee and Groups. Instead of listing specific Committees, the bylaws language change allows the Executive Committee to establish task forces and committees as necessary. This puts us in sync with the bylaws of AALL in this area.

**PLLIP COMMITTEES AND GROUPS REPORTS**

**GRANTS COMMITTEE**

Members: Leanna Simon, Chair; Alicia Pappas, Corrine Vogel, Debbie Maglione, Emily Gellings, Eugene Guidice
Committee Developments:

This year the PLLIP Grants Committee has worked with the PLLIP Executive Board to expand both the types and dollar amounts of scholarship to award members of the PLLIP Community. We have expanded not just in amounts given but also to strengthen our relationships with other associations and the legal community as a whole. Specifically, the monies given for member attendance to ILTACON and Janders in London. We increased funding from $4175.00 last year to $7850.00 for the current term.

Grants:

- ILTACON: Abby Walters, Maslon, LLP
- AALL Management Institute: Angela Krulc, Cleary; Lisa Njoku, Greenburg Traurig; Allison Reeve, Littler
- Janders Dean Conference: Jean O’Grady, DLA Piper
- PLLIP Summit Registration: Jennifer Stephens, Haynes & Boone; Jessica Fields, Miller Johnson; Christine Sellers, Nelson Mullins; Irene Chang, Paul Hastings
- PLLIP Travel Grant: Anne Lucke, NARF; Kendal Bergman, Fish & Richardson; Jessica Fields, Miller Johnson

AWARDS COMMITTEE

Members: Saskia Mehlhorn, Chair; Leanna Simon, Carla Evans, Alicia Pappas, JoAnn Hounshell

Awards:

- Distinguished Librarian – Caren Luckie
- Innovative Professional of the Year – Jeffrey M. Nelson
- Best Blogger/Writer of the Year – Jean O’Grady
- Hall of Fame – Bob Oakes
- Advocate of the Year – Scott Bailey
- Emerging Leader – Julie Jones
- Service to PLLIP – Linda-Jean Schneider
- Vendor/Outside Champion – Casey Flaherty

ANNUAL MEETING PLANNING COMMITTEE

Members: Julie Pabarja, Lucy Curci-Gonzalez, Chairs; Patty Schminke, Alina Kelly, Kendal Bergman

BYLAWS COMMITTEE

Members: Caren Luckie, Chair; Carla Evans, Johanna Bizub, Jennifer Dollar

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COMMUNICATIONS COMMITTEE
The PLLIP Communications Committee has been working with the PLLIP Board to re-evaluate and streamline our communications channels, so we’re better able to meet our goals of outward branding and internal engagement. In our outward branding efforts, our aim is to use the On Firmer Ground blog and the PLLIP Twitter account to get out a coherent message about the value private law librarians and information professionals provide both within their organizations, and to the larger legal community. We have been working to make the On Firmer Ground blog more active, and to encourage PLLIP member contributions to the blog. As far as internal engagement, we have been evaluating how to better promote our internal communications channels and resources, and how to best utilize MyCommunities, the PLLIP website and a PLLIP newsletter for timely and effective dissemination of internal business and news. The Board has engaged a digital marketing strategist as part of the Elevation Task Force’s efforts, and this strategist has been assisting the Communications Committee in assessing our communications channels, and deciding where and how to direct our branding and promotion efforts.

EDUCATION COMMITTEE

The PLLIP Education and Professional Development Committee had a very busy and successful year. We hosted four webinars and have one more scheduled for June 20th. In addition, we helped coordinate a two-part webinar with the Competitive Intelligence Group of PLLIP and the Competitive Intelligence group of the Legal Marketing Association. The first was conducted through LMA and the second by AALL as there were more attendees than our 100 allotted slots on the webex system. The Co-Chairs will remain the same for next year and we will be recruiting ideas and volunteers for 2017-2018 at the annual meeting. So far, Sarah Mauldin, Bryan Troyan, and Eugene Guidice have agreed to continue. Other volunteers are still committing and we already have webinars in the works for the rest of the year and into next year.

Attendance at 2016-2017 webinars:

Analyzing the Analytics: A Comparison of Legal Analytics Platforms, October 19, 2016
Registered 204
Attended 110

The Basics of In-Depth Trademark Searching, November 16, 2016
Registered 86
Attended 54

Mindfulness and the Law Firm Librarian, January 17, 2017
Registered 111
Attended 75

"You Ask, We Tell" Your CI Report Formatting Questions Answered, January 31, 2017
Registered 112
Attended 91

Artificial Intelligence – Practical Guidance for Law Libraries, June 20, 2017
Registered (as of June 12, 2017) 124
The Competitive Intelligence Groups of AALL and LMA

Always be Cross-Selling, April 25, 2017
Registered 270
Attended 170

Library and Marketing: Why Can’t We be Friends? February 23
Attended 211
Registered 316

EDUCATION FOR THE ANNUAL MEETING COMMITTEE

Members: Lucy Curci-Gonzalez and Julie Pabarja, Co-Chairs; Alina Kelly, Patricia Schminke and Kendal Bergman.

The Education for the Annual Meeting Committee was formed as a separate committee in order to focus on the program proposal process for the 2017 Annual Meeting and Conference and to serve as a resource for PLLIP members interested in submitting a program proposal.

In August 2016, this committee sent out notices to PLLIP members to contribute topics and vote for the ones that interested them in IdeaScale which AALL's Annual Meeting Program Committee (AMPC) used to identify the must-have topics for the conference. We promoted these must-have topics and encouraged PLLIP members to develop program proposals based on them.

The committee contacted each of the subgroups listed on the PLLIP website and encouraged them to submit a program proposal. Many of the subgroups were inactive which was brought to the attention of the PLLIP Executive Board.

Like other PLLIP committees and subgroups, a Community was created for this committee on AALLNET to centralize and archive communication. Usage on this community was not consistent since the group was small and using our email system was faster.

We encouraged PLLIP members to share their program proposals with the committee so that we could review their proposal prior to submission and offer suggestions on developing a strong proposal and identify possible speakers for their program. The deadline to submit proposals to AMPC was October 3, 2016. It also gave the committee a chance to keep track of the proposals submitted by our members and provided a pool of programs to select PLLIP’s sponsored program from.

The committee reviewed 19 proposals. This number does not reflect the actual number of proposals submitted by PLLIP members just what was reviewed. Many of the proposals that were reviewed were selected by AMPC.

As part of the process, PLLIP submitted 2 programs that PLLIP would sponsor and AMPC selected one of them. PLLIP pays for all the expenses related to the program selected including speaker(s) expenses, recording, and equipment. The program that was selected as PLLIP’s sponsored program is Identifying Competitive Intelligence in Public Filings: 30 Ways to Find the What, Where, Why and How. The committee has been communicating with Carolyn Hersch, the program’s coordinator, to ensure they have what they need to put on a good program.

The committee shared a list of declined programs submitted by PLLIP members to the Education and Professional Development committee to consider as possible webinars.

IP COMMITTEE
Members: Sarah Mauldin, Chair; Diana Koppang, Corrine Vogel, Debbie Maglione, Dawn Rohan, Zachary Kerns, Kevin Miles

The committee has had a quiet year. We co-sponsored two webinars with the PLLIP Education Committee this year: Diana Koppang’s Analyzing the Analytics: A Comparison of Legal Analytics Platforms, October 19, 2016 and Ron Kaminecki’s The Basics of In-Depth Trademark Searching, November 16, 2016. The annual PLLIP-IP breakfast business meeting will be held on Sunday, July 16 at 7:30 AM and any member interested in IP issues is invited to attend to discuss the current state of IP librarianship in law firms, what we are doing as a committee, and what we would like to do in 2017-18.

MEMBERSHIP COMMITTEE

Members: Alana Bevan, Chair; Diana Koppang, Kathryn Trotter, Jessie LeMar, Sarah Morris

Activities:

- Sent welcome emails to new members (34)
- Sent recruitment emails to new AALL members who fit our profile (36)
- Organized raffle to incentivize new membership
- Advertised PLLIP grants to boost membership

NOMINATIONS COMMITTEE

Members: Kim Serna, Chair; Erik Adams, Deanne Fix, John Klasey, Blythe McCoy, Syeda Razeen

*Report from Kim Serna*: Oct. 2016 I began assembling and recruiting members to participate on the Nominations Committee. Our first conference call was held on November 14, 2016, at which time the committee members were introduced and we reviewed the committee charge. We also discussed the available positions, identified potential candidates, discussed call for nominations on PLLIP Listserv and reviewed upcoming dates and deadlines.

Most of the committee activities, along with identifying candidates, took place over email communication. Once all nominations were received, a finalized list was distributed to each member of the committee for review. A second conference call was held on January 25, 2017, to discuss and review the list of candidates, identify four candidates for each available position; Treasurer, Member-at-Large, and Vice Chair, and discuss next steps in contacting candidates.

Each member of the committee contacted at least one individual to discuss their interest, review the duties associated with the various positions, and collect candidate bios and statements from those that agreed to run for office. Several candidates declined the nomination(s) due to workload and responsibilities.

We presented the board with the following slate of candidates February 10, 2017:

- Caren Luckie – Vice Chair
- Diana Koppang – Vice Chair
- Janet Peros – Member at Large
- Leanna Simon – Member at Large
- Margaret Bartlett – Treasurer
- Julie Pabarja – Treasurer
The slate was approved and presented to the membership on March 1, 2017. Election was held the first two weeks of April. The results were as follows:

- Diana Koppang – Vice Chair
- Janet Peros – Member at Large
- Julie Pabarja – Treasurer

**SUMMIT COMMITTEE**

Members: Alicia Pappas and Jeremy Sullivan, Chairs; Patricia Barbone, Marcia Burris, Denise Pagh, Cynthia Brown, Janice Henderson, Diana Koppang, Chris Laut, Christina McKennerney, Christine Sellers, Juli Stahl-Hughes, Pat Strebeck

Summit Agenda:

7:00-8:30 a.m. – Registration and continental breakfast – *generously sponsored by LEXISNEXIS*

8:30-8:40 a.m. – Welcome remarks: Alicia Pappas and Jeremy Sullivan, 2017 Summit Co-chairs

8:40-9:25 a.m. – Keynote Address – Professor Gabriel Teninbaum, Suffolk University Law School – *generously sponsored by WOLTERS KLUWER*

Professor Gabriel Teninbaum will explore the legal innovation landscape and describe how that is impacting (and will impact) law librarians. Hear how large and small law firms are incorporating technology, responding to client demands and feedback, and how AI and other technologies and trends continue to impact the competitive legal landscape. Delve into the roles of librarians in innovation, efficiency initiatives, and development of potential new revenue streams.

9:30-10:05 a.m. – Q&A w/ Professor Teninbaum

10:05-10:20 a.m. – Morning Break

10:20-11:50 a.m. – Can Librarians Help Legal Organizations Become More Data Driven? – Professor Daniel Katz, Chicago-Kent College of Law

Data science is a growing field within the legal industry. As organizations within the legal industry attempt to become more data driven, the skills held by law librarians are well suited to help law firms, corporate legal departments, courts and non-profits craft and execute a legal data strategy. After some introductory comments, the session will begin with a hands-on session where teams will help draft a legal data strategy in response to a specific vignette. After working through the specific scenario, Professor Katz will conclude with a general discussion of how to bootstrap a data strategy within your organization using a blend of experts, crowd-sourcing and algorithms.

11:50-1:15 p.m. Lunch – *generously sponsored by THOMSON REUTERS*

1:15-2:30 p.m. – The Librarian Speaks: Promoting a Technology Agenda – Panel session featuring Margaret Bartlett, Information Resources Librarian @ Locke Lord; Mark Gediman, Director of Research Services @ Best Best & Krieger; Gina Lynch, Director of Knowledge Management and Business Intelligence @ Paul Weiss; Nancy Rine, Director of Research Services & Conflicts @ Fried Frank

A moderated panel of your peers will share real life examples of how they work with the IT department to achieve and promote an agenda that leverages technology and knowledge to further the goals of the organization.
2:30-2:45 p.m. – Afternoon Break

2:45-4:00 p.m. – Surviving – and Thriving – in a Period of Change, V. Mary Abraham, Columbia University

Are you a Change Guerilla or Guru? Guerillas work tactically to shape change from the middle. Gurus work strategically to lead change. Both approaches are useful (and sometimes necessary) when your law firm is undergoing change. In this interactive session we will explore key methods used by change guerillas and gurus that can enable you to survive and even thrive in the midst of change.

4:00 p.m. – Closing remarks

SMALL AND MEDIUM LAW LIBRARIES

Members: Kathy Coon and Sandra Dunbar, Co-Chairs

This year, the Small and Medium Size Libraries Committee finalized and posted our group purpose on the SIS website. As stated, this committee is for those who work in law libraries with less than 200 attorneys to connect, share knowledge and lend support. There are currently 50 members on our My Communities Discussion Board which has the potential to become a valuable resource for those working in small and medium sized libraries. We held a roundtable meeting during the 2016 annual meeting which was attended by 10 PLLIP members.

The co-chairs, Sandra Dunbar and Kathleen Coon, submitted a proposal for the upcoming annual meeting titled: Making the Most of What You Have, or How Not to Drink from the Fire Hose. Unfortunately, it was not selected.

STRATEGIC DIRECTIONS COMMITTEE

Members: Laurel Evans and Mark Gediman, Chairs; James Gulvas

In November, the Strategic Directions committee began our work on a strategic plan. Our charge was to review the 2016-2019 AALL Strategic Plan and align our group’s goals with it, revising as necessary to better suit the particular needs of private law librarians and information professionals. We discussed and exchanged drafts several times. The strategic plan was completed and submitted in April 2017. We have since updated it with new timelines for the approval of the incoming board.

ELEVATION TASK FORCE

Co-Chairs: Scott Bailey, June Leibert; Board Liaison: Elaine Egan

ELEVATION TASK FORCE PARTNERS WITH BILL KAMPER OF SIMPLIFIED SOLUTIONS

Current Challenges

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- Negative or outdated perceptions regarding internal legal research or library services
- Other internal departments like IT, marketing or accounting are beginning to encroach on traditional areas of expertise causing a lack of clarity and ownership
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WEB SITE COMMITTEE

Members: Linda Jean Schneider and Kevin Miles, Chairs; Heather Williams; Advisory Board: Diane Deng, Julie Dowen, Lillie Murphy, Jill Sonnesyn

Linda-Jean Schneider and Kevin Miles continued their responsibilities as WebMasters, together with Heather Williams. Liz Whittington was the Board liaison in addition to having posting access to the site.

• The Team continues to monitor and post the more important updates and events of the PLLIP membership year on the current PLLIP homepage, hosted on AALLnet.org. Most of these items are reported first on the My Communities site, while some are received directly from the PLLIP Committee Chairs/Members.
• As members of the PLLIP Communications Committee, the WebMasters contribute to the significant and ongoing re-alignment of communication channels in response to specific feedback from membership and the Board, and a Town Hall meeting with Richard Leiter in December.
• The decision to cease issuing the PLLIP E-Newsletter—due primarily to the resignation of the Co-Editor—has had a significant impact on the way News and Events are announced to the membership. PLLIP Chair Cameron Gowan recommended identifying members who could volunteer to serve a short stint as an Advisory Board to the WebTeam to identify concerns and potential resolutions to maintaining currency and value.
• The Advisory Board and WebTeam conducted several calls, including one with the Digital Marketing Strategist who is advising the Communications Committee and the Board on next steps to transition to more effective outward branding and internal engagement.
• Kevin Miles will report to the Membership at the Annual Meeting on the status of progress made to enhance the website, keeping in mind that there is an Association re-branding and alignment effort which is scheduled to take place which could impact any adjustments made by their Team.
• Incoming Chair Elaine Egan has asked Kevin and Linda-Jean to continue in their roles for one more year to ease the transition to the new Communication model. They will work on identifying and recruiting one or two newly-interested volunteers to be trained in the WebMaster role. Heather Williams will likely step down due to increased responsibility in her role at her law firm.

INCOMING BOARD FOR 2017-1018

• Elaine Egan, Chair
• Diana Koppang, Chair-Elect
• Mary Ann Wacker, Secretary
• Julie Pabarja, Treasurer
• Janet Peros, Member-at-Large
• Michelle Tolley, Member-at-Large
• Cameron Gowan, Immediate Past Chair