



**PRIVATE LAW LIBRARIANS
& INFORMATION PROFESSIONALS
SPECIAL INTEREST SECTION**



PLLIP-SIS ANNUAL REPORT 2018-2019

BOARD MEMBERS

- Diana Koppang, Chair
- Saskia Mehlhorn, Chair-Elect
- Cynthia Brown, Secretary
- Julie Pabarja, Treasurer
- Janet Peros, Member-at-Large
- Jeremy Sullivan, Member-at-Large
- Elaine Egan, Immediate Past-Chair

COMMITTEE CHAIRS

- Awards: Carla Evans and Karen Oesterle
- Bylaws: Caren Luckie
- Communications: Andrea Guldalian, Robyn McAllen, and Julie Jones
- Education: Lindsey Carpino and Denise Pagh
- Annual Meeting Planning Committee: Alina Kelly and Shari Berkowitz Duff
- Grants: Leanna Simon
- IP: Sarah Mauldin
- Membership: John Davey and Magalie Desince
- Nominations: Susana Camargo-Pohl and JoAnn Hounshell
- PLLIP Summit: Christina McKennerney and Christine Sellers Sullivan
- Small and Medium Law Libraries: Alison Alifano and Kathy Coon
- Strategic Direction: Mark Gediman
- Web Site: Michelle Hook-Dewey and Brittany Kolonay

STRATEGIC ACCOMPLISHMENTS

This year, PLLIP-SIS reached out to increase our membership. We focused on outreach to members, with a survey and Town Hall meeting. We also held Monthly Board meetings.

PLLIP COMMITTEE AND GROUP REPORTS

GRANTS COMMITTEE

Members: Leanna Simon, Chair; Corrine Latham, Emily Gellings, Eugene Guidice

The following Grants were awarded:



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- **AALL Conference and Travel** – Michael Benain, Laura Chuang, Sabrina Davis, Katy Marcy, Christie Schauder, Lillian Steuben
- **CONNELL** – Katy Marcy, Christie Schauder
- **Executive Leadership Institute** – Kineret Gable
- **Innovation Bootcamp** – Carly Eyler, Lillian Steuben
- **LMA** – Barb Fullerton
- **Management Institute** – Andre Davison, Karen Grushka, Karen Whitney
- **PLLIP Speaking Engagement** – Allison Reeve Davis
- **PLLIP Summit** – Sabrina Davis, Janet McKinney, Kristen Perez, Lillian Steuben
- **Student Grant (AALL)** – Jenni Wallace, Cassidy Woodside

AWARDS COMMITTEE

Members: Carla Evans and Karen Osterle, Co-Chairs; JoAnn Hounshell, Reed Nelson, Caren Luckie, Leanna Simon, Karen Grushka

Awards were given to:

- Advocate of the Year – Diana Koppang, Director of Research & Competitive Intelligence, Neal, Gerber & Eisenberg
- Best Blogger/Writer of the Year – Marlene Gebauer, Director of Strategic Legal Insights, Greenberg Traurig
- Service to PLLIP Award – Andrea Guldalian, Library Resources Manager, Duane Morris

ANNUAL MEETING PLANNING COMMITTEE

Members: Shari Berkowitz Duff, Alina Kelly, Co-Chairs

- Acted as mentors or procured mentors for PLLIP members proposing Annual Meeting programs
- Solicited programs from PLLIP members/advertised the opportunity
- Highlighted PLLIP members' Annual Meeting programs by weeding through accepted programs and comparing to list of PLLIP members, and advertising the programs to the listserv in a day-by-day format
- Hosted a PLLIP program on Aug 7, 2018 on the Ideascale and program proposals.

BYLAWS COMMITTEE

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

The Bylaws Committee had a quiet year with no changes to the PLLIP bylaws.



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COMMUNICATIONS COMMITTEE

Members: Andrea Guldalian, Co-Chair, Robyn McAllen, Co-Chair; Julie Jones, Co-Chair; Shari Berkowitz Duff, Kristin Hallows.

The Communications Committee has continued to send Member News updates and has made an effort to include local chapter events/news, when possible. We have been working on updating some of the previously published PLLIP Resource Guides to reflect the new SIS name, and to include current links. We are moving the Resource Guides to the On Firmer Ground WordPress site since the separate Resource Guides WordPress site was no longer updated. We plan to publish new Resource Guides in the coming year, and to keep On Firmer Ground active by including Annual Meeting and PLLIP webinar recaps, re-posting of articles by or about our members, and new posts on topics of interest.

EDUCATION AND PROFESSIONAL DEVELOPMENT COMMITTEE

Members: Lindsey Carpino and Denise Pagh, Co-Chairs. Jennifer Berman, Marcia Burris, Eugene Giudice, Zach Kerns, Cheryl Niemeier, and Jim Senter. Mark Gediman and Kevin Miles participated as representatives of the CI Caucus; and Tanya Livshits participated as a representative of the IP Caucus.

We held five teleconference committee meetings on:

- August 8, 2018
- September 7, 2018
- December 12, 2018
- February 13, 2019
- May 7, 2019

Our goal for the year was to conduct eight webinars, and we completed nine.

SUBMITTING PLLIP PROGRAM IDEAS FOR AALL 2019

August 7, 2018 12:00 PM – 1:00 PM CDT

Do you have a great program idea for the 2019 AALL Annual Meeting and Conference in DC but don't know where to start? This webinar gives an inside look at the Annual Meeting Program Committee's (AMPC) program proposal process from submitting must-have topics on Idea Scale to how AMPC reviews the proposals and selects the programs for the annual meeting.

Speakers: Alina Kelly and Shari Berkowitz Duff

Number of attendees registered and number that attended: 19 attendees/23 registrants



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BEHIND THE SCENES WITH AALL'S BOK

September 21, 2018 12:00 PM – 1:00 PM CDT

What is AALL's Body of Knowledge (BoK)? PLLIP members who served on the BoK Development Special Committee took us on a behind the scenes look into how BoK was created and how we can get the most out of it. In addition, how we can use BoK as a resource when evaluating our skills and adopting it for professional development.

Speakers:

Philippe Cloutier, Global Communications Program Manager at Microsoft

Amy Eaton, Director of Library & Research Services Perkins Coie LLP

Greg Lambert, Chief Knowledge Services Officer at Jackson Walker LLP and AALL Past-President

Number of attendees registered and number that attended: 81 attendees/138 registrants

TECHNOLOGY CONTRACTS: TIPS FOR UNCOVERING AND NEGOTIATING THE DEVIL IN THE DETAILS

November 14, 2018 12:00 PM – 1:00 PM CDT

Negotiating technology contracts can be tricky! The importance of making sure the language, clauses, terms and, of course, price are amenable to all involved cannot be overemphasized. This Webinar featured a practicing attorney well versed in drafting technology contracts, teamed with a seasoned law librarian experienced with negotiating tech contracts, and a law library consultant. Together, they guided us in uncovering the "devil in the details" of contracts for online research services, and provided negotiating tips and best practices to assist you in reaching a mutually agreeable decision on contract language and terms.

Speakers:

Jeff Kosc, Partner, Taft Stettinius & Hollister LLP

Diana Koppang, Director of Research & Competitive Intelligence

Kris Martin, Senior Director, HBR Consulting

Number of attendees registered and number that attended: 112 attendees/192 registrants

START IT OR STOP IT? JUMP STARTING INITIATIVES AND INNOVATION IN 2019

February 6, 2019 12:00 PM – 1:00 PM CDT

Listen in on a lively conversation that will help you jump-start your new year! Since 2013, Jean O'Grady has been conducting a Start/Stop survey via her blog, Dewey B Strategic. As a prequel to the 2019 survey, Jean facilitated a panel discussion on new initiatives in the new year, including ways to remove obstacles and begin implementation. Gain wisdom from your colleagues as they disclose tactics for developing and executing new ideas, getting buy-in, etc., and be inspired as they share about some of the exciting new initiatives they have recently undertaken.



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Speakers:

Jean O'Grady, Director of Information Services, DLA Piper
Martin Korn, Director of Research & Knowledge Services, Sheppard Mullin
Stacy Pangilinan, Digital Services Manager, DLA Piper
Emily Rushing, Competitive Intelligence Manager, Haynes & Boone

Number of attendees registered and number that attended: 178 attendees/271 registrants

BASIC PATENT SEARCHING

March 13, 2019 12:00 PM – 1:00 PM CDT

Focusing on patent search engines that are open to all; covering search strategy construction and modification of strategy online; aspects of output and analysis

Speaker: Ron Kaminecki

Number of attendees registered and number that attended: 107 attendees/144 registrants

CRAFTING A USEFUL CI REPORT CAN BE A TASK THAT COMBINES INTUITION, DATA, ANALYSIS AND MIND-READING TO CREATE A MUST-READ DOCUMENT.

March 27, 2019 12:00 PM – 1:00 PM CDT

Our two experts will discuss how they determine what to put in their reports, from solid data to interesting prose.

Juli Stahl has eleven years of experience specializing and managing Competitive Intelligence at two firms.

Adam Lederer has experience integrating CI into Library Services.

Moderators:

Mark Gediman, Reference Librarian at Alston & Bird LLP
Kevin Miles, Manager of Library Services at Norton Rose Fulbright

Speakers:

Adam Lederer, Manager of Library Services at Norton Rose Fulbright
Juli Stahl, Law Librarian/Consultant

Number of attendees registered and number that attended: 179 attendees/277 registrants

ADVANCED PATENT SEARCHING

April 3, 2019 12:00 PM – 1:00 PM CDT



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Description: Developing different strategies for finding information not found in the first pass. Use of advanced aspects to systematize searching to cover all bases.

Speaker: Ron Kaminecki

Number of attendees registered and number that attended: 82 attendees/141 registrants

LAW SCHOOL AND LAW FIRM COLLABORATION: A BRIDGE BETWEEN THE LAW SCHOOL AND THE FIRM

April 11, 2019 12:00 PM – 1:00 PM CDT

Law firms have increasingly higher expectations of summer associates and first-year associates. Summer associates are given more substantive assignments with summer programs becoming shorter. First-year associates are required to provide higher value work that can be billed to clients.

This new reality can be a catalyst for collaboration between law firm librarians and law school librarians to ensure that summer and first-year associates are truly practice-ready.

This program will explore techniques and methods for law schools and firms to work together, in concrete and constructive ways, to help prepare law school students for life in a firm.

Speakers:

Steve Lastres – Debevoise & Plimpton – Director of Knowledge Management Services

Femi Cadmus – Director, Michael J. Goodson Library, Duke University

Camille Broussard – Director, The Mendik Library, New York Law School

Katie Brown – Deputy Director of the Law Library, Charleston School of Law

Margaret Schilt – Associate Law Librarian for User Services, D'Angelo Law Library, University of Chicago

Number of attendees registered and number that attended: 110 attendees/190 registrants

TRADEMARK SEARCHING

May 15, 2019 12:00 PM – 1:00 PM CDT

Explanation of issues with trademarks as a database, and how to resolve these issues using the USPTO's website

Speaker: Ron Kaminecki

Number of attendees registered and number that attended: 79 attendees/126 registrants

FROM CONVERSATION TO CONVERSION: GETTING LAWYERS TO USE NEW TOOLS

April 25, 2019 11:00 PM – 12:15 PM CDT



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Description: Costs are exploding. Staffing is tight. Budgets must be maintained. Whether you buy or build new legal knowledge and technology products, there is no guarantee of adoption. Email announcements remain unopened. The promise of food will not get associates to a conference room anymore. What is the answer? A panel of seasoned knowledge professionals will outline some techniques they use to drive, monitor, and assess digital adoption of new tools.

Speakers:

Cynthia Brown, Director – Research Services – Littler Mendelson P.C.

Jean O’Grady, Senior Director of Research & Knowledge – DLA Piper LLP

June Liebert, Firmwide Director of Library and Research Services – Sidley Austin LLP

Roger Scalbeck, Associate Dean & Professor of Law, University of Richmond School of Law Library

Cheryl Smith, Director of Information Services – O’Melveny & Myers LLP

Number of attendees: 155 attendees (registration for this event was managed by AALL so we couldn’t see the number that originally registered but did not attend)

MEMBERSHIP COMMITTEE

Members: John Davey and Magalie Desince, Co-Chairs

Membership increased by 50 new members since AALL conference. The committee sent recruitment emails to 40 prospective members, and promoted PLLIP during local chapter meetings.

NOMINATIONS COMMITTEE

Members: JoAnn Hounshell and Sue Camargo-Pohl, Co-Chairs; Margaret Bartlett, Jean O’Grady, and John Klasey

The Nominations committee ran a successful election in the spring of 2019.

SUMMIT COMMITTEE

Members: Christina McKennerney and Christine Sellers Sullivan, Co-Chairs; Cynthia Brown, Marcia Burris, Abby Dos Santos, Anna Forsher, Janice Henderson, Chris Laut, Janet Peros, Jeremy Sullivan, Alicia Pappas, Amy Eaton

PLLIP SUMMIT 2019: SUMMIT X: THE PATH TO 2030

The Summit began with a full breakfast buffet generously sponsored by Thomson Reuters. Following breakfast, Jordan Furlong, keynote speaker at the 2012 Summit and one of our most popular past presenters, discussed how the growing power and sophistication of legal intelligence will dovetail with and help to accelerate the transformation of law firms’ client services and business models. The keynote described how law librarians, knowledge engineers, and data analysts will play key roles as law firms



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become manufacturers, refineries, and exporters of actionable legal intelligence. We thank Wolters Kluwer for their generous support of this year's keynote address.

Following a short break, there was a set of back-to-back panel discussions designed to engage with and learn from our customers and stakeholders. The first panel, Law Firm Leadership: Managing the Change, focused on how law firms have responded to the sweeping changes in the legal industry over the last decade. Panelists also reflected on the keynote speaker's vision of how the delivery of legal services will be affected by the rapidly changing environment in which we work. Marcia Burris, Director of Research and Knowledge Management at Nexsen Pruet, led a conversation with Sonia Menon, Chief Operating Officer at Neal, Gerber & Eisenberg LLP; Mark Langdon, Executive Director at Ballard Spahr LLP; and Scott Rechtschaffen, Chief Knowledge Officer at Littler.

The second panel, Our Customers: The Evolving Use of Information Professionals, discussed how broader legal industry trends play out in day-to-day interactions between information professionals and customers. They also shared ideas on how we can help them push boundaries and position themselves successfully with their clients and in the legal marketplace in the coming decade. The participants in this panel were Toby Brown, Chief Practice Management Officer, Perkins Coie; Peter Alfano, Senior Associate at Squire Patton Boggs; and Julie Bozzell, Public Law and Policy Practice Manager at Akin Gump. Scott Bailey, Director of Research Services at Eversheds Sutherland will moderate.

The Summit had a luncheon generously sponsored by LexisNexis, with plenty of time for networking and discussion.

The afternoon was devoted to an interactive session focused on Design Thinking methodology. This session helped attendees develop skills that can be used in the workplace to create services and products, or to solve day-to-day problems. Attendees worked individually and together to identify some of the biggest challenges faced in law libraries today and then, as a group, attempted to solve those challenges. As the session wrapped up, each team had an opportunity to present their solutions, providing a wealth of shared knowledge. The Design Challenge was immediately followed by a closing cocktail reception for further networking and reflection.

SMALL AND MEDIUM LAW LIBRARIES

Members: Kathy Coon and Alison Alifano, Co-Chairs

About 20 members of the Small and Medium Law Libraries Group met in Baltimore and had a lively discussion that ranged from budgets to managing online resources to effectively multitasking with limited time and resources. The Members shared experiences and compared processes and procedures. The Group discussion also provided the chance to ask colleagues for suggestions and guidance on specific issues. At the 2019 meeting, we will be looking for a new co-chair to replace Kathy Coon and will be continuing our dialogue of shared experiences.



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WEBSITE COMMITTEE

Members: Michelle Hook-Dewey and Brittany Kolonay, Co-Chairs

The Website Committee has primarily assisted with getting material posted to and corrected on the PLLIP website now that AALL has taken over all SIS websites.

INCOMING BOARD FOR 2019-2020

- Saskia Mehlhorn, Chair
- Chris Laut, Chair-Elect
- Cynthia Brown, Secretary
- Leanna Simon, Treasurer
- Caren Luckie, Member-at-Large
- Jeremy Sullivan, Member-at-Large
- Diana Koppang, Immediate Past-Chair