PLLIP-SIS ANNUAL REPORT 2020-2021

BOARD MEMBERS

Chris Laut, Chair
Marcia Burris, Vice Chair, Chair-Elect
Allison Reeve Davis, Secretary
Leanna Simmons, Treasurer
Caren Luckie, Member-at-Large
Andre Davison, Member-at-Large
Saskia Mehlhorn, Immediate Past Chair

COMMITTEE CHAIRS

Awards: Karen Oesterle, Ronda Fisch
Annual Meeting Planning Committee: Alina Kelly, Shari Berkowitz Duff
Bylaws: Janice Henderson, Johanna Bizub
Communications: Andrea Guldalian, Robyn McAllen Broughton, Julie Jones
Education and Professional Development: Juli Stahl
Grants: Elaine Knecht
Membership: Marie Calvaruso
Nominations: Julie Pabarja
Summit: Cynthia Brown, Mary Abigail B. Dos Santos

STRATEGIC ACCOMPLISHMENTS

The Board committed to opening a conversation on diversity, equity, and inclusion by developing the inaugural Diversity Summit: From Difficult Conversations to Collaborative Action. In the words of the PLLIP Summit Committee, “PLLIP Summits have historically been a place to explore ways to embrace change and we are excited to partner with the BLL-SIS to launch the first ever Diversity Summit, which was created to facilitate these discussions [concerning race and ethnicity, gender and gender identity, sexual orientation, socioeconomic status, language, culture, national origin, religious commitments, age, and disability status in the world around us and in our profession] in order to find a call to action in which we can all take part.” The Summit Committee, Executive Board, and BLL-SIS are indebted to Fastcase and the PLLIP membership for sponsoring the Diversity Summit. PLLIP-SIS and BLL-SIS presented an absorbing conference to 180 attendees, which included Keynote speaker Michelle Silverthorn, a recognized expert in organizational inclusion, who also walked attendees through an interactive workshop meant to explore critical issues. The Diversity Summit included facilitated break-out rooms to further
discuss experiences, and hosted a panel of law librarians for Diversity Shares: Listen to Learn. Rachel Lyles moderated an intense and deeply personal discussion with panelists Ramon Barajas, Catherine Deane and Kim Nayyer to whom the Board will forever be grateful.

The Board reviewed and completely overhauled the PLLIP Procedures Manual through a multi-month process which included input from all the Committee and Executive Board members. The result is a more up-to-date and streamlined manual with stronger guidance for the Executive Board and Committees.

With respect to PLLIP’s Strategic Directions which has not been updated since 2014, the Board has pulled together a strong team made up of PLLIP-SIS members to update the document for a three-year going-forward time period. While the Procedures Manual is the SIS’s operating manual, the Strategic Directions document acts as a guiding light for PLLIP’s aspirations. The team will be working on this for the next year. One component of the Strategic Directions project will be a Mentorship program for AALL Annual Meeting submissions. This initiative defines separate roles for the Education for the Annual Meeting Committee from mentees to avoid conflicts in assisting with proposals and having to choose the submissions elevated, and will offer more personalized guidance to aspiring presenters to succeed.

ALM approached the Board again in 2021 and asked to recommend programs for the Legal Week conference. PLLIP provided two programs for LegalTech in New York in March 2021. While 2020-2021 presented further disappointment as we were unable to meet face-to-face, The Board continued the tradition started by Saskia Mehlhorn of a monthly Happy Hour, an open forum to break bread virtually.

COMMITTEE REPORTS

AWARDS COMMITTEE

Co-Chairs: Karen Oesterle, Ronda Fisch

Members: Janet McKinney, Caren Luckie, MaryAnn Wacker, Leanna Simon, Cynthia Smith, Reed Nelson, Michelle Gorospe

Awards were issued to:
- Distinguished Librarian – Andre Davison, Knowledge Management and Information Services Manager, Blank Rome
- Best Blogger/Writer of the Year – Allison C. Reeve Davis, Library Manager, Littler Mendelson
- Hall of Fame – Loretta Orndorff, Director, Library Service, Cozen O'Connor
• Advocate of the Year Award – Eugene Giudice, Senior Research Services Training Specialist, Dentons
• Vendor/Outside Champion Award – Mike Bernier, Director, Knowledge Services and Library Relations, Bloomberg Information Group

ANNUAL MEETING PLANNING COMMITTEE

Co-Chairs: Shari Berkowitz Duff, Alina Kelly

• Acted as mentors/procured mentors to provide feedback for PLLIP members proposing Annual Meeting programs.
• Solicited programs from PLLIP members/advertised the opportunity for PLLIP program sponsorship at the AALL Annual Meeting.
• Hosted a PLLIP Webinar, “Gearing up for Cleveland – Tips and Tricks for Submitting Annual Meeting Program Proposals” on October 26, 2020, on the Ideascale website and program proposals.
• Highlighted PLLIP members’ Annual Virtual Meeting programs and speakers by reviewing list of accepted programs and comparing to list of PLLIP members, and advertising the programs to the listserv.
• Updated PLLIP Procedures Manual Section for the Education for the Annual Meeting Committee.

BYLAWS COMMITTEE

Co-Chairs: Johanna Bizub, Janice Henderson

Members: Mary Jenkins, Patricia Barbone, Caren Luckie, Margaret Kribble

The Committee was asked to review the PLLIP Procedures Manual focusing on the sections pertaining to the Bylaws Committee. The Committee reviewed and made recommendations to align with AALL’s. This Committee is charged with the responsibility of reviewing the SIS Bylaws annually, making sure they are in compliance with AALL’s Constitution and Bylaws, soliciting input for changes from the Board or recommendations from AALL, drafting appropriate language, and recommending any changes it deems necessary to the Executive Committee. Those changes are then, sent to the AALL Bylaws & Resolutions Committee for review. The revised/updated/new sections are then presented to the PLLIP Board for approval. After the PLLIP Board approves the changes, they are sent to the membership for a vote at the PLLIP Annual Business meeting.
The Executive Committee asked that we review Article X of the Bylaws pertaining to the Nominating Committee. The Executive Committee approved the following language:

There shall be a nominating committee appointed by the Executive Committee consisting of three to six (3-6) members, none of whom shall be a member of the Executive Committee or a candidate for office at the succeeding election. Each member of the committee shall serve a term of one year. The Chairperson of the Nominations Committee shall be proposed by the Chair of the Executive Committee and approved by the Executive Committee.

Members will vote on the language at the PLLIP Annual Business Meeting in August.

COMMUNICATIONS COMMITTEE

Co-Chairs: Andrea Guldalian, Julie Jones, Robyn McAllen

Members: Patricia Barbone, Shari Berkowitz Duff, Mary Cate Matta, Kevin Miles, Megan Moltrup, Allison Reeve-Davis, Linda-Jean Schneider

The Communications Committee solicits and sends Member News updates on a monthly basis to highlight PLLIP members’ activities and PLLIP events. The Committee continues to monitor the PLLIP website to keep it updated. The Committee has also been working to keep the On Firmer Ground blog active by reposting member-authored articles, posting write-ups of webinars and other AALL/PLLIP events, and posting original content on topics of interest to the private law librarian and information professional community, and to the broader legal community. The Communications Committee aims to help keep PLLIP members informed of events of interest to them, and to generate and disseminate content promoting the value of private law firm librarians.

EDUCATION AND PROFESSIONAL DEVELOPMENT COMMITTEE

Co-Chairs: Juli Stahl

Members: Denise Pagh, Barbara Fullerton, Kevin Miles, Eugene Guidice, Julie Pabarja, Mark Gediman, Krista Ford, Sarah Hooke, Clanitra Nejdl

The Education Committee coordinated with all the PLLIP committees for continuing education outreach, including offering value-added AMPC training for potential AALL Annual Conference presenters. Furthermore, the Committee delivered two education sessions for ALM LegalWeek: Virtual Everything –
Keeping Attorneys & Staff Productive in a Remote Environment; and How I Met the New Client – Avoiding Embarrassing Conflicts.

GRANTS COMMITTEE

Chair: Elaine Knecht

Members: Jessica Fields, Lee Carnes, Meg Kribble, Trish Petitt

Two registration grants ($449 each) were awarded for the Virtual Management Institute that took place March 23rd and 24th, 2021. Awardees were Andrea Guldalian (Duane Morris), and Lindsey Carpino (Baker Law).

Once again, the Committee and the Board offered the 2020 awardees for the AALL Annual Meeting the opportunity to put the award toward the 2021 virtual meeting or to utilize the grant for the 2022 conference. Every recipient asked to use their grants at the 2022 Annual Meeting. The Board may decide to make additional grants available next year in addition to those already awarded. Announcements were made beginning in May 2021 regarding the availability of ten (10) $99 registration grants for the virtual AALL Annual Meeting, and complimentary Summit registrations for unemployed members.

As of June 7, 2021, we have two takers for the $99 grants: Michelle Trovillo (Baker law) and Stephanie Huffnagle (Goldberg Segalla). No one has contacted the Committee regarding a registration waiver (available to unemployed members) for the Summit. Additional reminders about these opportunities ($99 grants and waivers) will be posted to the Community in the next 2 weeks.

PLLIP also made available two grants ($349 each) to the AALL Executive Leadership Institute, held on July 28th and 29th, 2021. Maureen Burns (Godfrey Kahn) was awarded one of the grants.

Next year in Denver!

MEMBERSHIP COMMITTEE

Chair: Marie Calvaruso

Members: Blythe McCoy, Katherine Taggart

Membership increased by 55 new members since the 2020 AALL conference. The committee sent
recruitment emails to 19 prospective members to promote PLLIP membership.

NOMINATIONS COMMITTEE

Chair: Julie Pabarja

Members: Diana Koppang, Blythe McCoy, Morgan Wood

The Nominations Committee began their work by identifying active PLLIP-SIS members who should be considered as potential candidates for the PLLIP-SIS Executive Board, including a concerted effort to select a diverse slate of candidates. The committee also asked PLLIP-SIS members for their nominations. We received a good response and the following slate was submitted to the Board:

Vice-Chair/Chair-elect – Kim Serna and Christine Sellers Sullivan
Treasurer – Andrea Guldalian and Clarence Robertson
Member-at-Large – Ramon Barajas and Whitney Brionez

The committee would like to thank these candidates for their participation in the election. They all hold strong leadership qualities and would serve well leading PLLIPSIS.

The candidates were featured on the PLLIP-SIS listserv along with their bio, personal statement, and their thoughts on why being a PLLIP-SIS member was important to them and what challenges in our profession should PLLIP-SIS address today. This gave the membership the opportunity to learn more about these candidates prior to the election.

The committee coordinated with Allison Reeve Davis, PLLIP-SIS Secretary, and Chris Siwa at AALL to hold the election. The election was held March 22 – April 16.

The election results were:

- Vice-Chair/Chair-elect – Christine Sellers Sullivan
- Treasurer – Clarence Robertson
- Member-at-Large – Ramon Barajas

The Committee also drafted significant revisions to the Committee’s responsibilities for the PLLIP Manual including recommendations for term limits for committee members and chair(s) and setting a more concrete timeline for the nominations process. Additionally, the committee suggested robust guidance on
seeking a more diverse slate of candidates and additional means of soliciting these nominations. These recommended revisions were then subject to approval by the PLLIP Board

SUMMIT COMMITTEE

Co-Chairs: Cynthia Brown, Mary Abigail B. Dos Santos

2021 Summit

Summit Members: Christine Sellers Sullivan, Lisa Fricker, Janice Henderson, Alexandra Olson, Janet McKinney, Janice Henderson, Elizabeth Whitaker, Theresa Greco, Kathy Taggert, Kevin Miles, Holly Riccio, Saskia Mehlhorn

The 2021 PLLIP Summit was held on virtually on Friday, July 16, 2021. The theme for the Summit was Responding to Chaos and Change.

April Rinne gave the Keynote, which kicked off the Summit by zooming out — beyond any one change management strategy, tool, or technique — to explore our relationships to change, period. She asked, “When everything is in flux, what does it mean to have a “Flux Mindset?”” Participants learned practices to boost self-awareness and see change differently. April helped us look back and look forward. Her message emphasized that our conference isn’t about any one change or any one year, but rather preparing for a future in flux and thriving in it!

Following the Keynote, attendees broke out into facilitated discussion groups. These groups were held twice during the Summit to allow participants to participate in as many topics as possible.

- The future of print: What is your organization doing with print? Share your successes and failures with removing print from your collection. How to deal with training attorneys, working with vendors, and utilizing creative solutions.
- Training, marketing, and engaging attorneys: How to reach out to attorneys in an online or hybrid environment. What tools have you used to facilitate adoption of online tools? Share your tips, tricks, successes and failures, and learn from your colleagues.
- Technology tips: Applying Online Tools in the Library. For example – Gannt charts and project management; Excel pivot tables; SharePoint for statistics, FAQs, request tracking; and winning internet designs and strategies. Share your best kept secrets and learn from the group.
Following a break, David Lat sat down with attendees for a Fireside Chat. June Liebert interview David, who has unique personal perspectives on chaos and change. David Lat has made multiple career changes over the years, often during periods of great upheaval, from lawyer to legal journalist to legal recruiter and back to legal journalist. As the founder and managing editor of Above the Law (“ATL”), which he led from 2006 to 2017, he had a front seat to chaos and change in the legal industry, specifically the financial crisis a decade ago, which he covered closely at ATL. Last March, David came down with a severe case of Covid-19. He spent three weeks in the hospital, including a week in the intensive care unit on a ventilator, fighting for his life. In the wake of his Covid-19 experience, he came to realizations about his life and career which led him to make dramatic personal and professional changes of his own. In a wide-ranging interview with June Liebert, a member of the AALL Executive Board and Director of Information Services at O’Melveny & Myers, David shared his candid insights, based on both his experience last year with Covid and as a commentator covering the legal profession for the past two decades.

The final session of the day was a workshop entitled Restocking Your Change Toolkit: An Interactive Workshop, with Brie Leung. Brie is a seasoned facilitator and change agent, and she put together a fast-paced workshop about surviving and thriving in a changing world. Leveraging multiple change management frameworks and real-life experience, Brie equipped participants with concrete tools and fresh ideas centered around her 4 Truths to Change:

- Change is a process.
- People have an emotional, human reaction to change.
- Successful change creates great leaders.
- Change is constant and it isn’t going away.

The workshop was interactive utilizing polls, chats and independent exercises. Participants walked away
with a restocked toolkit for navigating and leading change in their personal and professional lives. Bloomberg Law sponsored a virtual Social Hour following the Summit. Event activities included: Live music; a photobooth; and breakout rooms where fellow attendees could chat and relax.

We are grateful for the sponsorship and support from each of the sponsors of the 2021 Summit: Bloomberg Law, Fastcase, LexisNexis; and Thomson Reuters. We are also grateful for the 2021 Summit Planning Committee members who worked diligently throughout the year. Their work cannot be underestimated and is greatly appreciated.

**2021 Diversity Summit**

Diversity Summit Members: Christine Sellers Sullivan, Andre Davison, Alexandra Olson, Christina McKennerney, Holly Riccio, Denise Pagh, Rachel Lyles, Jamie Holdeman, Errol Adams (BLL-SIS), Yolanda Jones (BLL-SIS), Marjorie Crawford (BLL-SIS)

On February 26, 2021, over 250 attendees participated in the inaugural PLLIP-SIS and BLL-SIS Diversity Summit: From Difficult Conversations to Collaborative Action. The year 2020 was one of upheaval and change, underscoring the need for serious and important conversations regarding race and gender issues in the world and in our profession. PLLIP Summits have historically been a place to explore ways to embrace change and we were excited to partner with the BLL-SIS to launch the first ever Diversity Summit, which was created to facilitate these discussions in order to find a call to action in which we can all take part.

The work toward racial justice requires all our innovation and dedication. Our keynote Michelle Silverthorn, best-selling author, keynote speaker, and founder & CEO of Inclusion Nation, spoke to the challenges of equity and inclusion in our own workplaces and communities, including racism, bias, and the persistent belief that “I don’t see color and I don’t see race.” Then, in a unique virtual workshop in the afternoon, she worked with us to design our own solutions to the challenges we see to get us all started on implementing real, sustainable change for good. Michelle explored bias, microaggressions, privilege, and racism, and left attendees with some practical tools to put into place to create spaces of equity and inclusion. Using lived experiences, best practices, and the very real truths of the past year in America, Michelle took attendees through a journey from recognizing why diversity matters, to making it matter for good.

The keynote was followed by a special panel Diversity Shares: Listen to Learn. Panelists included:
The panel was moderated by Rachel Lyles (Research Specialist, Orrick, Herrington & Sutcliffe). The day included two discussion group sessions allowing participants to reflect upon the topics from the keynote and the panelists.

We would like to thank Fastcase and PLLIP for their generous sponsorship without whom this Summit would not be possible. We especially want to thank BLL-SIS for their willingness to partner with PLLIP in this venture. Finally, we owe a debt of gratitude to Denise Pagh and her firm, Orrick, Herrington & Sutcliffe for the use of their Zoom account. Their generosity enhanced our ability to be interactive and improved our overall Virtual Summit experience.

Clearly there is much to be done concerning diversity and equity in our profession and indeed our nation, but we hope that the Diversity Summit helped attendees see a way for them to make a change. These can be difficult conversations, but this was an opportunity for each of us to rise to the challenge of choosing to work toward collective solutions.

INCOMING BOARD 2021-2022

Marcia Burris, Chair
Christine Sellers Sullivan, Vice Chair, Chair-Elect
Allison Reeve Davis, Secretary
Clarence Robertson, Treasurer
Ramon Barajas, Member-at-Large
Andre Davison, Member-at-Large
Chris Laut, Immediate Past Chair