PLLIP-SIS ANNUAL REPORT
2022 – 2023

BOARD MEMBERS
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Awards: Ronda Fisch
Bylaws: Janice Henderson and Johanna Bizub
Communications: Robyn Broughton and Megan Kelleher
Diversity Summit: Abby Dos Santos and Rachel Lyles
Education for the Annual Meeting: Shari Berkowitz Duff and Emily Florio
Education and Professional Development: Julie Jones and Ana Toft-Nielsen
Grants: Julie Pabarja
Membership: Marie Calvaruso
Nominations: Saskia Melhorn
PLLIP Summit: Janet McKinney and LiMin Fields
Speaker Mentoring: Barbara Fullerton
Strategic Directions: Leanna Simon
Competitive Intelligence Caucus: Kevin Miles and Mark Gediman
Intellectual Property Caucus: LiMin Fields and Courtney Keaton
Knowledge Management Caucus: Scott Bailey and Saskia Melhorn
Records and Conflict Management Caucus: Chris Laut
Small and Medium Law Libraries Caucus: Tina Dumas
STRATEGIC ACCOMPLISHMENTS

PLLIP continued its commitment to providing educational and growth opportunities for members through professional development programs provided by PLLIP committees, including the Education and Professional Development, the PLLIP Summit committee, and the Diversity Summit committee (in collaboration with BLL-SIS). The PLLIP Education and Professional Development committees planned and executed 10 webinars, four of which had more than 100 attendees. Topics covered skills in research, technology, administrative/management, and interpersonal relationships. The PLLIP-BLL Diversity Summit Committee held the third annual Diversity Summit, “Advocacy and Allyship,” as a virtual event on Friday, February 24, 2023, with a total of 116 attendees. The 2023 PLLIP Summit: “Navigating the Here and Now” will return to being held in person at the AALL Annual Meeting on July 15, 2023. As of June 15, 2023, the registration total is 137 attendees.

PLLIP also continued to encourage and support PLLIP Members in developing content for the AALL Annual meeting through the Education for the Annual Meeting committee, which recommended two proposals to PLLIP Board for sponsorship, both of which were chosen as conference programs.

The PLLIP Speaker Mentoring Committee, which launched in 2021 to help support aspiring PLLIP speakers in proposing, preparing, and presenting AALL annual meeting and other programs and content, created and established a Pilot Program with regular check ins with mentors/mentees that has received overwhelmingly positive feedback.

PLLIP funded numerous professional development grants available to PLLIP members, as well as provided funding in support of the third annual PLLIP-BLL Diversity Summit and the PLLIP Summit.

In addition, the Strategic Directions committee, which was formed in 2021 to draft a new proposed Strategic Plan to replace the former strategic plan dated 2012-2014, submitted recommendations to the PLLIP Executive Board. The Committee has reviewed a range of goals, objectives, and tasks over the past three years to promote the value of PLLIP librarians, expand their presence, enhance education opportunities, and foster recruitment and diversity within the field.
COMMITTEE REPORTS

AWARDS COMMITTEE

Committee Members: Ronda Fisch, Chair; Clarence Robertson, Board Liaison; Leanna Simon; Scott Snipes; Mary Ann Wacker; Cynthia Smith; Reed Nelson; Caren Luckie; Holly Gale; Irene Chang; and Allison Reeve Davis.

The 2023 PLLIP Award Recipients were:

- **Advocate of the Year** – Lindsey Carpino
- **Best Blogger/Writer of the Year** – Emily Moog
- **Distinguished Librarian of the Year** – Holly Riccio
- **Hall of Fame** – Michael Bernier and Gayle Lynn-Nelson
- **Vendor/Outside Champion Award** – Mark Torchiana

BYLAWS COMMITTEE

Committee Members: Johanna Bizub and Janice Henderson, Co-Chairs; Juli Stahl, Board Liaison; Patricia Barbone; Mary Jenkins; and Caren Luckie.

This year, the PLLIP Bylaws Committee conducted the first ever training session on PLLIP’s Bylaws and Procedures Manual for PLLIP leaders to inform them about the PLLIP Bylaws, the PLLIP Bylaws Committee, and the Committee’s interactions with the PLLIP Executive Board and the AALL Bylaws and Resolutions Committee. This training was held on Friday, October 14, 2022.

The Committee also reached out to the PLLIP Committee Chairs for feedback on the Procedures Manual. Updates and changes were made and sent to the PLLIP Executive Board so that they can be shared and posted to the website.

COMMUNICATIONS COMMITTEE

Committee Members: Robyn Broughton and Megan Kelleher, Co-Chairs; Ramon Barajas, Board Liaison; Amy Weiner; Mary Cate Matta; Kevin Miles; Janice Easton Epner; Theresa Greco; and Kristen Hallows.

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. The 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 Committee has also worked to highlight PLLIP at the Annual Meeting by creating a series of display posters for the 2022 Denver meeting and have begun preparations for the 2023 Boston meeting.

The committee is in the process of revamping the collection of PLLIP Resource Guides. The first guide, Competitive Intelligence, has been finished and is awaiting publication.

DIVERSITY SUMMIT COMMITTEE

Committee Members from both PLLIP-SIS and BLL-SIS: Abby Dos Santos, Chair; Rachel Lyles, Co-Chair; Christina Sims, PLLIP-SIS Board Liaison; Yolanda Jones, BLL-SIS Board Liaison; Cynthia Brown; Marjorie Crawford; Andre Davison; Mary Godfrey-Rickards; Zanada Joyner; Courtney Keaton; Janet McKinney; Brittany Menton; Denise Pagh; and Holly Riccio.

The Diversity Summit Committee planned the third annual Diversity Summit, “Advocacy and Allyship,” which was held as a virtual event on Friday, February 24, 2023. PLLIP and BLL started the Diversity Summits in response to the community unrest after George Floyd’s murder and ongoing conversations that members were having both personally and professionally about social and racial justice. This year’s Diversity Summit provided our membership with an opportunity to build on our skills by learning how to better support DEIA efforts, advocate for marginalized communities, and identify ways to empower ourselves to create change.

The 2023 Diversity Summit had 116 registered AALL members, which included a mix of private, academic, and government law librarians and information professionals. The virtual keynote and workshop were recorded and made available to all those who were registered. Responses to our 2023 Diversity Summit Feedback Survey were overwhelmingly positive, with 86% of respondents indicated they were Very Satisfied (5/5) with the overall event, and 80% of respondents indicated that they were Very Likely (5/5) to attend future Summits (and the remaining respondents for both questions selecting 4 out the 5 scale). The interest in the Diversity Summit topic and the convenience of the online format were the top two reasons for why people attended.
The virtual summit included a keynote, workshop, and moderated discussion. The keynote speaker was Michelle MiJung Kim, a queer Korean American immigrant woman writer, speaker, and activist. The keynote included a fireside chat with Michelle and Abby Dos Santos, Diversity Summit Chair, reflecting on Michelle’s work and what it means to be a DEIA advocate and ally. The virtual event also included an interactive workshop by Willie Jackson from ReadySet. He is a speaker, consultant, and facilitator who helps organizations advance vital conversations that unlock connections across differences. Attendees reflected on how to successfully undertake allyship at work and beyond. By illustrating the stakes of allyship as well as practical tools to achieve it, this training provided an optimal way to foster healthy workplaces for all. The day concluded with a moderated discussion to reflect on the day’s themes of advocacy and allyship, led by fellow law librarians from the Diversity Summit Committee.

EDUCATION FOR THE ANNUAL MEETING COMMITTEE

Committee Members: Shari Berkowitz Duff and Emily Florio, Co-Chairs; Juli Stahl, Board Liaison; Megan Scanlon; Jacqueline Norton; Katie Gorrell; and Debbie Rusin.

The Committee for Education for the Annual Meeting promoted Ideascale to PLLIP members as opportunity to provide and vote on must have program topics for the annual meeting. The Committee also hosted a Webinar, “Preparing for Boston: A Discussion on Submitting Annual Meeting Program Proposals” on September 29, 2022 to review: timeline for the program proposal process, outlined committee’s role, included examples for preparing strong proposals and details for seeking PLLIP sponsorship. Shari Berkowitz Duff represented the Education for the Annual Meeting Committee and Erik Adams represented the Career Mentoring Committee. The Committee received over ten program proposal drafts either seeking review/feedback by the committee and/or seeking PLLIP sponsorship and recommended two proposals to PLLIP Board for sponsorship, both of which were chosen as conference programs. The two recommended and accepted proposals were: “Patent Storytelling: Creating Relatable Narratives Out of Big Data” and “Real World APIs: Who Is Using Them, And What Are They Doing With Them?”

The Committee also highlighted programs of interest, as well as PLLIP members who are speakers, moderators, and/or coordinators on Annual Meeting programs, by reviewing list of accepted programs and comparing to lists of current PLLIP members, and by posting the information in multiple areas including My Communities and the Monthly Members News.

EDUCATION AND PROFESSIONAL DEVELOPMENT COMMITTEE

Committee Members: Julie Jones and Ana Toft-Nielsen, Co-Chairs; Alexis Branham, Board Liaison; Tanya Livshits; Kevin Miles; Brittany Menton; Kristen Naik; Kathy Ly; and Jeannette Mazur.
The Education & Professional Development Committee planned and executed ten webinars, four of which had more than 100 attendees. Topics covered skills in research, technology, administrative/management, and interpersonal relationships. We also brought in some new voices – several presenters were first-time speakers for PLLIP programs.

The following programs were hosted by the Education and Professional Development Committee:

- September 20, 2022: “Introducing USPTO’s Patent Center;” 148 Attendees; Speakers: Courtney Keaton; LiMin Fields; Kari Forsyth, Lexis; and Nick Valentino, Lexis
- October 18, 2022: “Better Together: Working with contractors and consultants as a team;” 67 Attendees; Speakers: Jeff Nelson; Pam Wedemeyer; Jonathan Grant; and Colleen Cable
- November 9, 2022: “EIN numbers – how to find them;” 28 Attendees; Speaker: Barbara Fullerton
- February 15, 2023: “Quick Tips & Tricks for Law Librarians Using Excel;” 135 Attendees; Speakers: Jeannette Mazur and Chris Pamboukes
- February 28, 2023: “Spoiler Alert: Are You Letting Your Docket Tracks Manage You?;” 170 Attendees; Speakers: Amy Backes; Jill Kilgore; Julie Jones; and Trish Hoskins
- March 14, 2023: “Super-Sleuthing on a Shoestring: Free Resources for Investigations;” 126 Attendees; Speaker: Nicole Cullinane
- April 19, 2023: “TikTok Made Me Do It: Let’s Talk About Neurodiversity at Work;” 43 Attendees; Speakers: Lauren Wortman; Alexis Branham; Leah Fisher; and Belinda Lauer
- May 11, 2023: “Competitive Analytics: Evaluation of Litigation Analyses of 3 Top Products;” 77 Attendees; Speakers: Caren Luckie; Mark Gediman; Grant Keyes; and Kevin Miles
- May 22, 2023: “API 101: Basics and More;” 72 Attendees; Speakers: Martin Korn; Erik Adams; and Kristen Naik
- June 7, 2023: “Navigating the Complexities of Law Firm Library Mergers: Strategies for Success;” 20 Attendees; Speakers: Scott Bailey; Courtney Toiaivao; and Angela Kennedy

GRANTS COMMITTEE

Committee Members: Julie Pabarja, Chair; Christine Sellers Sullivan, Board Liaison; Lee Carnes; Trish Petitt; Mary Ann Wacker; Barb Gonzalez; and Megan Butman.

The 2022-2023 Grants Committee was responsible for coordinating the grant program. The PLLIP-SIS Executive Board approved the education opportunities and the number of grants offered. This committee handled the communications that these grants were available, evaluated the submitted applications, and awarded grants to those applicants that would gain value by attending these events for their personal
career growth. Each grant recipient is required to submit an article to *On Firmer Ground* sharing their experience.

Here is a list of grant recipients for 2022-2023. There were no grant applications submitted for the Diversity Summit or to participate in any of the AALL eLearning courses.

- **Managing Your Work Environment**: Janet Peros and Connie Chang
- **PLLIP Summit**: David Baker; Chris Pamboukes; and Brooke Raymond
- **CONELL**: Katie Bosso
- **AALL Annual Meeting and Conference**: Katie Bosso; Samantha Duckworth; Christine Dulac; Chad Gilman; Sarah Glassmeyer; and Amanda Marshall

**MEMBERSHIP COMMITTEE**

Committee Members: Marie Calvaruso, Chair; Clarence Robertson, Board Liaison; Blythe McCoy; Kathy Taggert; and Julie Randolph.

Membership of PLLIP stands at 1305 total members, with 32 new members.

**NOMINATIONS COMMITTEE**

Committee Members: Saskia Mehlhorn, Chair; Marcia Burris, Board Liaison; Blythe McCoy; Ana Toft-Nielsen; Allison Reeve Davis; and Megan Kelleher.

The Nominations committee presented the following slate of candidates for 2023-2024: for Vice Chair/Chair-Elect: Abby Dos Santos and Alina Kelly; for Treasurer: Janet McKinney and Kevin Miles; and for Member-At-Large: Chris Moua and Rosa Hall.

Those elected were: Abby Dos Santos for Vice Chair/Chair Elect; Janet McKinney for Treasurer, and Rosa Hall for Member At Large.

All the candidates are thanked for their willingness to serve PLLIP.

**PLLIP SUMMIT COMMITTEE**

Committee Members: Janet McKinney, Chair; LiMin Fields, Vice-Chair; Alexis Branham, Board Liaison; Ramon Barajas, Board Liaison; Kathleen Brown; Abby Dos Santos; Lisa Fricker; Barbara Fullerton; Sarah
Glassmeyer; Theresa Greco; Eugene Guidice; Janice Henderson; Dana Jones; Julie Jones; Saskia Mehlhorn; Kevin Miles; Holly Riccio; Kimberly Serna; Kathy Taggart; and Rita Young.

The PLLIP Summit Planning Committee planned and coordinated the 2023 PLLIP Summit: “Navigating the Here and Now,” scheduled for Saturday, July 15, 2023, in conjunction with the AALL Annual Meeting and Conference in Boston. The Committee agreed that this year’s theme would focus on developing “soft” and practical skills in our hybrid environmental and explore ways to perform to our potential in our new digital reality. As of June 15, 2023, the registration total is 137.

This is the first year that the PLLIP Summit has adopted a graphic/logo to accompany the theme. The image resembles a generic paper map with location “pins” similar to those used for digital maps. Each pin had a different color, and the Committee decided to associate each session in the agenda with one of the pins.

Deviating from the typical Summit agenda in which a keynote address is the first session, the day will begin with a panel of librarians as a means of setting the stage and focusing on our colleagues. “Pin Drop Blue: The View from My Rooftop” panel, will be moderated by Colleen Cable and includes a diverse group of legal information professionals from various-sized firms discussing the current trends they observe and face in their settings. The panel members are David Baker; Marie Calvaruso; Catherine Monte; Michael Saint-Onge; and Jill Strand.

The keynote speaker is Dr. Larry Richard, founder and CEO of LawyerBrain LLC. His topic is “Adapting to the New Normal? The Psychology of Coping with Change.” He will offer evidence-based tactics for attendees to manage stress and build resilience. The Committee hopes he will provide some insight into “lawyerbrain”!

After lunch, Csilla Ilkei, Insight Director with Gardner & Co. will offer a brief presentation of Gardner & Co.’s “smarter collaboration” models to enhance attendees’ ability to create and bring value to their organizations. The second half of the session will be an information chat with Csilla and Committee member Eugene Guidice.

In accordance with the Planning Committee’s conviction that networking and creating connections is a hallmark of the PLLIP Summit, the next session combines an afternoon break with the opportunity for discussions based on specific topics, to converse with fellow attendees, or to have time to themselves.
The final session of the Summit day will be a panel of newer legal information professionals sharing their perspectives on navigating the here and now, their reflections on the day, and their ideas for the next adventure. Allison Reeve Davis will serve as the moderator. The other panelists will be Christine Moua; Sharalyn Williams; Nicole Guerrero Cullinane; and Marina Valenzuela.

Bloomberg Law will sponsor a Welcome reception open to all PLLIP members on the evening of Friday, July 14, at The Bank Fish House. LexisNexis will sponsor the Keynote address. Lunch will be sponsored by Thomson Reuters.

SPEAKER MENTORING COMMITTEE

Committee Members: Barbara Fullerton, Chair; Marcia Burris, Board Liaison; Erik Adams; Emily Florio; Holly Riccio; Kathleen Brown; Ana Toft-Nielson; Laura Weidig; John DiGilio; and Cynthia Brown, former member.

The Speaker Mentoring committee launched in 2021 to help support aspiring PLLIP speakers in proposing, preparing, and presenting AALL annual meeting and other programs. The committee seeks to pair highly experienced presenters who are ready to give back, with newer voices within PLLIP membership who would benefit from mentorship in the area of presenting and professional speaking.

The Committee has accomplished the following since Aug. 2022: created and established Mentor/Mentee Pilot Program with regular check ins; developed Marketing/Outreach to PLLIP; developed and submitted AALL Pre-Conference Program workshops; created a survey used in the Pilot Program; created and arrange Coffee Chat event for Committee, Mentors/Mentees at AALL annual meeting; and promote the committee at other events.

STRATEGIC DIRECTIONS COMMITTEE

Committee Members: Leanna Simon, Chair; Christine Sellers Sullivan, Board Liaison; Christina Sims, Board Liaison; Chris Laut; John DiGilio; Lynn Murray; Diana Koppang; and Saskia Mehlhorn.

Overview

The Strategic Directions Committee has been actively engaged in various initiatives over the past three years to promote the value of PLLIP librarians to the legal industry and enhance their visibility and influence. The following are the potential goals, objectives, and tasks reviewed by the committee during this period.
Goal 1: Promoting the Value of PLLIP Librarians

Objective 1.1: Expand presence and visibility at local, regional, and national legal association meetings in member cities.
   - Task 1.1.1: Arrange for PLLIP representatives to participate as speakers or mentors at these events.
   - Task 1.1.2: Communicate speaking opportunities and deadlines to PLLIP membership.
   - Task 1.1.3: Support PLLIP Grants Committee in determining funding for attendance at events like ABA Tech and local/regional chapters.

Objective 1.2: Enhance PLLIP's online presence and communication channels.
   - Task 1.2.1: Update and maintain PLLIP social media platforms and the American Association of Law Libraries (AALL) sites.
   - Task 1.2.2: Expand the responsibilities of the Communications Committee to include coordinating the Plan for Social Networking.
   - Task 1.2.3: Reestablish the website subcommittee within the Communications Committee.
   - Task 1.2.4: Encourage members to contact their alumni associations when they win awards to advance their careers.

Objective 1.3: Increase recognition through awards and nominations.
   - Task 1.3.1: Nominate PLLIP members for AALL awards and the Leadership Academy.
   - Task 1.3.2: Conduct annual outreach to PLLIP members, soliciting updates for awards, retirement, hall of fame, etc.
   - Task 1.3.3: Evaluate the need for changing or adding charges for the Awards Committee.

Objective 1.4: Inform librarians about the latest trends, competencies, and contributions.
   - Task 1.4.1: Develop educational programs by the Education Committee to disseminate benchmarking, metrics, and survey results.
   - Task 1.4.2: Collaborate with organizations running surveys to obtain relevant data.
   - Task 1.4.3: Promote PLLIP's thought leadership by sharing survey findings and studies with members.
   - Task 1.4.4: Keep PLLIP membership informed about surveys conducted by external entities, such as American Lawyer, AALL SOTP, and HBR.

Objective 1.5: Enhance promotional and marketing efforts.
   - Task 1.5.1: Utilize PLLIP AALL Listserv and LinkedIn page to capture suggestions and comments from members.
   - Task 1.5.2: Develop a Best Practices Guide for routine submissions to PLL/non-AALL publications.
   - Task 1.5.3: Partner with vendors to develop platforms that incorporate librarian input and influence.
• Task 1.5.4: Compile a list of vendor advisory boards to promote and encourage PLLIP member participation.

Goal 2: Education Opportunities
Objective 2.1: Provide resource guides and programming for professional development.
  • Task 2.1.1: Develop resource guides and educational programs on topics like budgets, technology platforms, practice-specific training, communication skills, management, and career development.
  • Task 2.1.2: Explore partnerships with legal industry associations (e.g., ABA, ILTA, ALA, LMA) and library/research associations (e.g., SLA, ALA, SCIP) to expand educational offerings.
  • Task 2.1.3: Integrate PLLIP training with AALL’s education platform (e-learning).
  • Task 2.1.4: Assess the feasibility of managing PLLIP’s own programming initiatives.

Goal 3: Recruitment
Objective 3.1: Promote recruitment into the field of law librarianship.
  • Task 3.1.1: Contribute to existing minority scholarship funds through AALL and identify other causes/groups that align with PLLIP’s mission (e.g., NextGen).
  • Task 3.1.2: Create a toolkit for PLLIP members to engage with local schools/groups and share best practices in recruiting aspiring law librarians.
  • Task 3.1.3: Involve PLLIP members teaching legal research classes in MLS and JD programs to support recruitment efforts.
  • Task 3.1.4: Establish a regional list of volunteers who can serve as guest speakers at library schools and provide the list to relevant institutions.

Goal 4: Promote diversity
Objective 4.1: Foster diversity within the field of law librarianship
  • Task 4.1.1: Actively seek diverse speakers for panels and webinars, promoting a wide range of backgrounds and experiences.
  • Task 4.1.2: Organize programming on recruiting diverse and inclusive candidates to law library teams.
  • Task 4.1.3: Explore funding opportunities for education specifically targeting minority members.
  • Task 4.1.4: Review and align AALL guidelines on diversity to ensure alignment with PLLIP’s initiatives.

Conclusion
The PLLIP Strategic Directions Committee has reviewed a range of goals, objectives, and tasks over the past three years to promote the value of PLLIP librarians, expand their presence, enhance education opportunities, and foster recruitment and diversity within the field. These efforts aim to strengthen the influence and visibility of PLLIP librarians in the legal industry and ensure their continued professional development.

INTELLECTUAL PROPERTY CAUCUS

Co-Chairs: LiMin Fields and Courtney Keaton

In September 2022, the PLLIP-IP Caucus teamed up with the Education & Training group and Lexis IP to host a webinar on the USPTO’s newly released Patent Center. Later in the year, the Caucus released a survey to the group to get a better understanding of what the members were most interested in obtaining from the group. Based on the responses, the Caucus hosted a round table in January covering current issues with vendors.

RECORDS AND CONFLICT MANAGEMENT CAUCUS

Chair: Chris Laut

Law firm librarians have been expanding their scope of influence to include managing client intake and conflicts, overseeing records departments, and sitting on information governance committees. To properly cover the scope of responsibilities and duties in records and conflicts, the group expanded our area of interest to the broader topic of information governance. Our meetings consisted of vendor reviews, lessons learned and best practices concerning project implementations, and firm standards and policies. We covered many topics, including information governance policies, paperless offices, records retention schedules, physical records management, client intake, lateral records policies and processes, conflicts review and analysis, and ethical walls. Attendees ranged from those who were interested in the topic with no formal information governance responsibilities, to members who lead records and conflicts teams and have authority over creating and maintaining Records Retention Schedules and Information Governance Policies.
INCOMING BOARD 2023-2024

Christina Sims, Chair,
Abby Dos Santos, Vice Chair, Chair-Elect
Juli Stahl, Secretary
Janet McKinney, Treasurer
Alexis Branham, Member-at-Large
Rosa Hall, Member-at-Large
Christine Sellers Sullivan, Immediate Past Chair