

## Annual Report 2015-2016

### Board Members

Members of the 2015-2016 Private Law Librarians & Information Professionals - Special Interest Section (PLLIP-SIS) Board were:

- Scott Bailey, Chair
- Cameron Gowan, Chair-Elect
- Nancy Rine, Secretary
- Laurel Evans, Treasurer
- Liz Whittington, Member-at-Large,
- Marcia Burris, Member-at-Large
- Cheryl Niemeier, Immediate Past Chair

### Strategic Accomplishments:

**Thanks to the Board for their continued revisions and attention to the PLLIP Handbook Revisions (March 2016), Strategic Directions and Resource Guides available at the PLLIP web site.**

### Additional Strategies for 2016:

#### Formation of Elevation Task Force and Objectives

**Assess, track and promote the value of our strategic services and management to the legal industry and its stakeholders.**

- **Collect best and worst example articles**
- **Meet and respond when appropriate**
- **Proactively publish and establish collaborative and strategic publication relationships**

**Reach out to our most valuable target audience for input, collaboration and mutual education.**

- **Research, profile and identify strategic targets and track relationships**
- **Formalized and spontaneous PR Efforts**
- **Solicit external input from targets and consultants**

**Prepare enhanced, targeted marketing materials and resources informing media inquiries and educating the industry and highlight best in class value proposition content.**

- **OFG Blog**
- **Media Packet**
- **Explore Standards/Recognition for Best Practice Firms**

**Support and initiate programs, events and collaborations that enhance our high value visibility.**

- **Independent Value Showcases**
- **ILTA, LMA, ALA, ABA programs, speaking, contribution & membership**
- **Strategic Sponsorships**

## Introduction of Elevation Task Force

Welcome to the Elevation Task Force! Much appreciation in advance for all of the insightful contributions that will help PLLIP and our profession as a whole get noticed... for the right reasons!

The objectives of this group are to provide ongoing recommendations to PLLIP and AALL about:

- Standards and value designations for our services and management capabilities
  - What are our strategic values/contributions and how do we value rank them?
- Effective promotion of our advanced services and management capabilities to our stakeholders
  - Outreach and PR regarding these strategic best practices

This may require hiring consultants or outside assistance to reach our target market and Jean and I have had conversations with AALL and the board has essentially authorized us to spend our own funds for this initiative.

While there may be a survey component here, that is not the sole goal or outcome of this strategy. We are seeking a group that can drive ongoing initiatives and solutions that promote and assess our value.

## Communications Upgrade and New Editorial Team

Steve Lastres managed the Communications Committee to the next level:

1. Fortify and Expand PLLIP Brand and PR Initiatives including Outreach to New Members	2. Work on updating Communications Plan including social media outlets	3. PLLIP E-Newsletter including member profiles and On Firmer Ground	4. Develop New PLL Research Guides	5. Work with ALM on Law Librarian Survey	6. Manage marketing and distribution of PLL events (webinars, Summit, awards,etc.)	7. PLL web site Development
Scott Bailey (leader)	Andrea K. Guldalian (leader)	Kurt Mattson (leader)	Natalie Lira (leader)	Jean O'Grady (leader)	Sarah Mauldin (leader)	Linda-Jean Schneider (co-leader)
Jean O'Grady	Steve Lastres	Cheryl Niemeier	Julia Berry	Andrea K. Guldalian	Nina Platt	Kevin Miles (co-leader)
Steve Lastres	Julie Jones	Lindsey Ann Carpino	Andrea K. Guldalian	Corrine Vogel	Corrine Vogel	Heather Williams
Andrea Guldalian	Nina Platt	Andrea K. Guldalian	Anna Irvin	Mary Ann Wacker		Andrea K. Guldalian
Lindsey Ann Carpino	Natalie Lira	John DiGilio	Corrine Vogel	Sarah Mauldin		Kathleen Coon
Shari Berkowitz	Corrine Vogel	Mary Ann Wacker	Lindsey Ann Carpino	Shari Berkowitz		Julia Berry
		Shari Berkowitz	Shari Berkowitz			
		Julie Jones				

## **“New” News Team for PLLIP (and no, it does not include Ron Burgundy)**

In keeping with our new dynamic name and brand strategy, PLLIP communications are transforming as well. We are excited to announce that the PLLIP Board and Communications Committee have approved 2 new roles: News Editor of the PLLIP Newsletter and Blog Editor. Cheryl Niemeier, immediate Past Chair, has been appointed the Blog Editor of what is envisioned to be an expanded version of the PLLIP newsletter. Her popular Around the Blogosphere column will become more interactive with other platforms (provide examples?) and will take collaborative communication to the next level. We are excited also to have Kurt Mattson joining us to capitalize on his experience at Lexis and Pratt to take the PLLIP news beyond its current borders.

Please let Kurt and Cheryl know what you would like to hear more about! We need all of our members to find this a useful way to collaborate and learn about what is going on in our world.

Thanks to Sarah Mauldin for her many years of service to PLLIP, including her many years as Newsletter editor.

## **PLLIP-SIS Summit July 2016**

PLLIP-SIS Summit 2016: Strategic Impact  
Hyatt Regency Chicago – Ballroom AB  
Saturday, July 16, 2106  
Chicago, IL

### Morning Schedule:

7:00 – 8:30 Registration and Continental Breakfast – generously sponsored by LexisNexis  
8:30 – 8:40 Welcome Remarks – Denise Pagh and Jeremy Sullivan, Summit Co-Chairs  
8:40 – 9:45 Keynote Address – Law Firms in Transition: The Concerns of Law Firm Leaders in 2016 and How We Can Help – Eric Seeger (Altman Weil) – generously sponsored by Wolters Kluwer  
9:45 – 10:00 Morning Break  
10:00 – 12:00 How to Think and Act Strategically: React, Align, and Optimize – Paul D. Meyer (Tecker)  
12:00 – 1:15 Luncheon – generously sponsored by Thomson Reuters – Ballroom CD

### Afternoon Schedule:

Concurrent Breakout Sessions – Attendees will participate in two of these three sessions:

- Enhancing Research and Library Service Models – Paul D. Meyer (Tecker)
- Securing Buy-in through Strategic Communication – Megan Wilroy (Akina)
- Tactics for Strategic Partnerships & Building Institutional Knowledge

Panel Session featuring Elaine Egan (Shearman & Sterling), Connie Crosby (Houser Henry & Syron), Marlene Gebauer (Greenberg Traurig), and Chris Laut (Liberty Mutual)

1:15 - 2:30 Afternoon Session I – choose one of the options above  
2:30 – 2:45 Afternoon Break  
2:45 - 4:00 Afternoon Session II – choose another option from above list  
4:05 – 5:00 Strategy Into Action

Wifi access: View available networks, Select Bloomberg Law/AALL 2016 and enter the password Bloomberg Law

Twitter hashtag for the Summit is #PLLIPSummit

2016 Summit evaluation forms will be emailed to participants after the event

**Outreach: Ongoing Collaborative Efforts with other Professional Associations**

In response to priorities expressed in both the PLLIP-SIS Strategic Plan and priorities on the part of AALL, there have been numerous joint efforts to reach out 'at the grass roots' as well as national and international level to promote the expertise and value of Law Firm Librarians.

**Ongoing Efforts:**

- We invited representatives of SLA Legal Division to attend the PLLIP Summit and PLLIP Annual Luncheon and Business Meeting as VIPs.
- We encouraged members to contribute content to Spectrum and the AALL blog, and publications in the larger legal industry such as ILTA's Peer to Peer Magazine and other legal industry publications. And our members took us up on this with many PLLIP members writing for and getting published in many law library legal industry publications and blogs. Additionally, we revived the On Firmer Ground blog and expanded opportunities for our members to more easily contribute content to it.

**2016 Update:**

- Liaised with Cara Schillinger, AALL Director of Membership, Marketing, and Communications, on ensuring PLLIP representation in contact between AALL and MLS/JD-MLS programs  
Recruited new members through advertisement of PLLIP Summit and Meeting grants on two national listervs
- Recruitment emails sent to 39 new AALL members who fit the PLLIP type  
Welcome emails sent to 84 new PLLIP members

**PLLIP Committees and Groups reports:**

2015-2016

Private Law Librarians & Information Professionals SIS

Grants Committee

**Members:**

Lee Elliott Carnes, Chair; Leanna Simon; Debbie Maglione; Alicia Pappas; and Corrine Vogel

## **Committee Developments:**

This year the committee used Survey Monkey to rate potential candidates for grant awards. It provided a system to accurately rank each nominee that was available to all members of the committee remotely.

## **Grants:**

Business Skills Clinic - Chicago, IL

PLLIP Grants Committee awarded a grant to Diane Duffey for registration to the AALL Business Skills Clinic that took place in Chicago, October 16-17, 2015. The strategically key topics of the Clinic were management finance, human relations, marketing and communications, performance measurements, negotiations and strategic planning.

Leadership Academy Grant - Oak Bridge, IL

PLLIP Grants committee awarded a grant to Jessica L. King for the 2016 Leadership Academy grant. The 2016 Leadership Academy took place in Oak Brook, Illinois, April 1-2, 2016. The Leadership Academy was designed to develop essential leadership skills, the program includes practical and interactive discussions, assessments, small group activities, and mini-presentations.

Summit and Annual Conference - Chicago, IL

PLLIP Grants Committee recommendations for the 2016 Summit and Annual Conference.

- 2 Summit Registration grants (Karen Oesterle and Elaine Knecht)
- 2 AALL Annual meeting registration grants (Janella Beitz and Sarah Morris)
- 2 AALL travel grants (airfare only) (Janella Beitz and Sarah Morris)
- 1 CONELL grant (Michayla Sullivan)

## **PLLIP Webmaster Team**

### **Annual Report 2015 – 2016**

Our Team consists of Kevin Miles of Norton Rose Fulbright, Heather Williams of Paul Hastings, Linda-Jean Schneider of Morgan Lewis, and our newest member, Liz Whittington of KLGates.

This year the Team was pre-occupied with building on the previous year's successes: the re-design and re-branding of the PLLIP website, spearheaded by Heather and her UserX project management, and the PLLIP-sponsored program, "So You Want to be a WebServices Librarian?" which was grounded by Kevin's stellar presentation on various Web/CMS tools and Heather's 'beaming in' regarding the site re-design project.

With the site re-design in place with frames to give structure and visual appeal, we have been able to update content more easily and quickly to reflect the ever-changing highlights, activities, and current announcements of the PLLIP SIS. We have continued to wrestle with a few technical issues having to do with the limitations of the AALL.net CMS platform. These include difficulties with migrating links from locked-down Communities on AALL.net, and concerns about permissions for Webinar content. Also, some issues remain with posting of the Board Minutes and related documents on the site, due to constrictions regarding varying versions of Microsoft Word and other products.

With the limitations mentioned above, we have found that linking to the various WordPress sites (for the Summit and the Newsletter) is often an easier way to manage our content. Kevin's background as a website manager for an AALL Chapter has informed that analysis. And Heather has suggested a few improved ways to better manage the "Archives" of material, which is also constricted by the capabilities of the AALL.net platform. Again, using a Word Press site is probably the best option.

On occasion in the past, the volunteer Webmasters could feel as if they needed to function and respond much as a well-paid Help Desk without the full depth of information required to move forward. However, the PLLIP Board and Committee Chairs provided great support throughout the year as we worked our way through these issues and others. As we look forward to the coming year, we'll try to align more closely with the Board and Chairs to determine the most relevant content to post, and to vet that material if possible. With Liz on the Board itself, the Team may have a clearer direction for this.

**Corporate**

- No report

**Independents**

- No report or activities this year and as this group has been inactive for a number of years it is recommended that the group be done away with.

**Intellectual Property**

- No report

**Knowledge Management**

- No report

**One-Person Libraries**

- No report

**Records/Conflicts Management**

- No report

**Private Law Librarians & Information Professionals Annual Business Meeting & Luncheon**

PLLIP-SIS Annual Business Meeting Luncheon

Sponsored by Thomson Reuters  
Sunday July 17, 2016

## Program

- Welcome and thank-you to Thomson Reuters, our luncheon sponsor
- Brief remarks from Tommy Williams, Vice President, Large Law Firms
- Welcome to AALL Board Members in Attendance
- Welcome and thank you to all PLLIP Annual Meeting Sponsors: see attached for detailed listing
- Business Meeting
  - Approval of Minutes from July 2015 Annual Business Meeting
  - Treasurer's Report from Laurel Evans
- Membership Report: from Diana Koppang
- Nominations Report: from Emily Florio
- PLLIP Summit Summary: from Denise Pagh
- Website: from Linda Jean Schneider
- Communications: from Steve Lastres
- Education Committee: from Jennifer Berman
  - Acknowledgement of PLLIP Volunteers
  - Chair's remarks, accomplishments and summary of committee reports
  - Introduction of new PLLIP Board Members and thank-you to outgoing Board members
    - ❖ Vice Chair/Chair elect – Elaine Egan
    - ❖ Secretary – Mary Ann Wacker
    - ❖ Executive Board member – Michelle Tolley
    - ❖ Thank-you outgoing officers: Past Chair, Cheryl Neimeier; Secretary, Nancy Rine; and Board Member, Marcia Burris
  - PLLIP-SIS Grant Recipients
    - ❖ PLLIP Summit Registration Grant – Karen Oesterle; Elaine Knecht; Marcia Burris
    - ❖ AALL Annual Meeting Registration Grant – Janelle Beitz; Sarah Morris
    - ❖ AALL Annual Meeting Travel Grant – Janelle Beitz; Sarah Morris
    - ❖ CONELL Registration Grant – Michayla Sullivan
  - Presentation of PLLIP Awards by Scott Bailey
    - ❖ Distinguished Librarian – Elaine Knecht
    - ❖ Hall of Fame – Janet Accardo, Bess Reynolds
    - ❖ Service to PLLIP – Lucy Curci-Gonzalez
    - ❖ Rookie of the Year – Corrine Vogel
    - ❖ Vendor/Outside Champion – Fastcase
  - PLLIP-SIS Award Criteria
  - PLLIP Committee Reports
  - AMPC Call for Proposals for AAAL, Austin 2017, June Liebert
  - Open Remarks for all members
  - PLLIP members that are presenting should stand and tell the membership what you are presenting, when, and where
  - Passing of the Gavel to new Chair, Cameron Gowan
  - Closing of Official Business Meeting

## PLLIP Executive Board

<u>PLLIP Officers</u>	<u>Incoming 2016-2017</u>	<u>Prior Year 2015-2016</u>
• Chair	Cameron Gowan	Scott Bailey
• ViceChair/Chair Elect	Elaine Egan	Cameron Gowan
• Past Chair	Scott Bailey	Cheryl Niemeier
• Treasurer	Laurel Evans	Laurel Evans
• Secretary	Mary Ann Wacker	Nancy Rine
• Board Members	Liz Whittington, Michelle Tolley	Liz Whittington, Marcia Burris

## Congratulations to our 2016 PLLIP-SIS Award Recipients!

**Distinguished Librarian:** *Elaine Knecht*, Director of Information Services, Barclay Damon, LLP, Buffalo, NY

**Hall of Fame:** *Janet Accordo* (Ret.) and *Bess Reynolds* (Ret.)

### Rookie of the Year:

*Corrine Vogel*, Research Librarian, Baker Botts

### Service to PLLIP:

*Lucy Curci-Gonzalez*, Executive Director, New York Law Institute, New York, NY

### Vendor/Outside Champion:

*Ed Walters*, CEO, Fastcase

## Grateful Acknowledgments

I am most grateful to an energetic board and committee membership as well as the myriad other members who elevated our profession in 2015-2016 and beyond. I am particularly grateful to Cameron Gowan who will take it to the next level in 2016 and onward!

Respectfully submitted,

Scott Bailey, PLLIP-SIS Chair, 2015-2016