

# THE CRIV SHEET

THE NEWSLETTER OF THE COMMITTEE ON RELATIONS  
WITH INFORMATION VENDORS

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Vendors (CRIV) Members**

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Jacob Nunnally  
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Christy Smith

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# EDITORS' CORNER

## ASHLEY ARRINGTON

INSTRUCTIONAL SERVICES LIBRARIAN  
TEXAS TECH UNIVERSITY SCHOOL OF LAW

## ANDREW CHRISTENSEN

DEPUTY DIRECTOR OF THE LAW LIBRARY  
WASHINGTON AND LEE UNIVERSITY SCHOOL OF LAW

### ***The CRIV Sheet***

[Ashley Arrington](#)  
[Andrew Christensen](#)  
CO-EDITORS

### **Education**

Jane Bahnon  
Saadia Iqbal  
Elizabeth Outler  
Jeanne Frazier Price

### **CRIV Page & Tools**

Ashley Arrington  
Cynthia Condit  
Saadia Iqbal  
Christy Smith  
Elizabeth Outler  
Christy Smith

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Jeanne Frazier Price  
Christy Smith

### **Vendor Roundtable**

Cynthia Condit  
Jacob Nunnally  
Carol Ottolenghi  
Elizabeth Outler  
Jeanne Frazier Price

Dear Readers,

Happy summer! With yet another academic year behind us and another June issue to offer, we find ourselves looking forward to connecting with our *CRIV Sheet* colleagues at the [2023 AALL Annual Meeting & Conference](#). This year, the opportunity to “Map Our Future” with modern, key considerations surrounding legal information and information vendors is top of mind.

To that end, you will find a preview of Annual Meeting programs likely to be of interest to CRIV-minded attendees in this issue. We would love to include summaries of these programs in our November 2023 issue, so please let us know if you are interested in writing a program review. And, as always, please let us know if you are interested in authoring a separate contribution for a future issue.

We also feature two informative articles by CRIV members. First, with the COVID-19 public health emergency officially concluded, Jacob Nunnally offers an insightful analysis of pre- to post-pandemic changes in vendor customer services, focusing on the impacts on contracts and invoicing within law libraries.

Carol Ottolenghi continues a valuable series, spotlighting the wide range of resources that government agencies make freely available as information “vendors.” This time, she discusses U.S. Patent and Trademark Office resources that can benefit academic, firm, and government law libraries alike.

We hope you enjoy this June 2023 issue of [The CRIV Sheet](#) and look forward to seeing you in Boston next month!

# FROM THE CHAIR

## CYNTHIA CONDIT

HEAD OF FACULTY AND ACCESS SERVICES &  
PROFESSOR OF PRACTICE  
UNIVERSITY OF ARIZONA COLLEGE OF LAW

Greetings Readers!

As always, thank you for stopping by to read *The CRIV Sheet*. This is the final issue for this year's CRIV team. Once again, Andrew Christensen and Ashley Arrington, co-editors, have put together a terrific issue. Don't hesitate to dig in!

Speaking of CRIV publications, I also encourage you to catch the upcoming series of blog posts on the [CRIV Blog](#), which highlight the CRIV website and the vendor tools and information available to the AALL community. Posts will spotlight the "Vendor Relations Policy," "Fair Business Practices for Legal Publishers," "Policies & Procedures for Licensing Electronic Resources," CRIV's vendor liaisons, and the [Request for Assistance](#) web form. Additionally, look for posts highlighting the *CRIV Blog* and *The CRIV Sheet*.

The [CRIV vendor liaisons](#) are currently conducting their second semi-annual meetings with Bloomberg Law, LexisNexis, Thomson Reuters, and Wolters Kluwer. You will find reports of these meetings published on the *CRIV Blog* and in *The CRIV Sheet*.

CRIV subcommittee project work continues:

- The Education Committee, chaired by Elizabeth Outler, is developing a handbook for current and future CRIV members' reference. The Member Advocacy Committee, under Jeanne Frazier Price's guidance, is putting together a vendor questionnaire related to electronic user statistics. This past March, Jeanne was invited to attend the Western Pennsylvania AALL chapter meeting. She came away with a list of issues and ideas the chapter shared regarding vendors, which the committee is reviewing.
- The annual Vendor Roundtable will be a virtual event this year. The topic and date will be available soon. Watch for an announcement of the event.
- The CRIV Page & Tools Committee conducted a review of the [CRIV webpages](#) within AALLNET. Members checked for broken links, evaluated information for updating, and considered potential changes to the website to facilitate easier access and use by the community. By the way, if you are looking for the Antitrust FAQs Sheet, please note that it has been removed. The FAQs were developed several years ago and are out of date. The AALL Executive Board will be moving forward to develop and adopt an antitrust policy for the AALL community. When completed, the antitrust policy will be posted to the CRIV website.

### **CRIV Blog** [crivblog.com](#)

Christy Smith  
BLOG COORDINATOR

### **Listserv Liaisons**

Andrew Christensen  
ALL-SIS  
Andrew Christensen  
BLL-SIS  
Elizabeth Outler  
LIT-SIS  
Christy Smith  
LSRD-SIS  
Elizabeth Outler  
PLLIP-SIS  
Elizabeth Outler  
RIPS-SIS  
Christy Smith  
SR-SIS  
Christy Smith  
TS-SIS

### **Vendor Liaisons**

Jeanne Frazier Price  
BLOOMBERG LAW  
Monique Gonzalez  
LEXISNEXIS  
Elizabeth Outler  
THOMSON REUTERS  
Jane Bahnson  
WOLTERS KLUWER



Upcoming CRIV highlights at the AALL Annual Meeting:

- Huge thanks to Jeanne Frazier Price, Monique Gonzalez, Jacob Nunnally, and Elizabeth Outler who are creating a CRIV poster and will be on hand at the Poster Session in the Exhibit Hall. Please stop by to view the poster and chat with them.
- Congratulations to Monique Gonzalez and Elizabeth Outler who were selected to participate in a curated panel at the Annual Meeting. The panel will discuss **“Moving Beyond Print.”** Elizabeth will serve as the moderator and Monique as a panelist. The panel is scheduled for Sunday, July 16 from 3:15 p.m. - 4:15 p.m. in Hynes 302.
- Incoming CRIV Vice Chair Andrew Christensen will also be a panelist, alongside vendor representatives and information professionals from a range of employers and backgrounds, in **“Collaborating with Vendors: Marketing, User Needs, and Product Development.”** The program will take place Monday, July 17 from 3:30 p.m. - 4:30 p.m. in Hynes 306.

This is my final “From the Chair” column. I can’t begin to say enough about the terrific people I have had the privilege to work with this past year. We all have become busier and busier in our work lives and finding time to contribute to any commit-

tee takes a high level of dedication. This team has shined!

Thank you to Christy Smith who has managed the *CRIV Blog* so wonderfully. We all appreciated her gentle reminders to keep us on target when our week to post was coming up, her assistance with post topics, and her guidance on writing a post. Of course, thanks again to Andrew Christensen and Ashley Arrington, amazing co-editors, for tackling *The CRIV Sheet* publication. Their hard work securing great articles, putting together each issue, and ensuring timely publication is immensely appreciated. I’m grateful to the vendor liaisons, Jane Bahnson (Wolters Kluwer), Elizabeth Outler (Thomson Reuters), Monique Gonzalez (LexisNexis), and Jeanne Frazier Price (Bloomberg Law) who took the time to set up semiannual meetings with the vendors and follow up with published updates to the community on what’s happening, as well as managing any requests for assistance. Special shoutout to Saadia Iqbal, Carol Ottolenghi, and Jacob Nunnally, who served on more than one CRIV subcommittee and who provided blog posts and/or *CRIV Sheet* articles throughout the year.

This coming year CRIV’s chair will be Jeanne Frazier Price, law library director at the University of Nevada-Las Vegas. It’s been an absolute delight to have her as a partner this past year! I depart knowing I am leaving CRIV in excellent hands.

Enjoy the issue!

## GETTING AHEAD OF IT: “POST-PANDEMIC” CONTRACTS AND INVOICES


JACOB NUNNALLY

ASSISTANT DIRECTOR OF ACCESS AND COLLECTIONS SERVICES  
HOFSTRA UNIVERSITY MAURICE A. DEANE SCHOOL OF LAW

Earlier this year, the U.S. Department of Health and Human Services **announced** that COVID-19 will no longer be considered a public health emergency at the end of the day on May 11, 2023. This got me thinking: Now that we live in a more or less “post-pandemic” society, how does 2023 compare

to 2019 at law libraries? Specifically, I have wondered what, if anything, has changed since 2019 in terms of two of the most fundamental aspects of technical services work: contracts and invoices.

This article examines where law libraries currently stand within the four-year historical context



of the COVID pandemic. After briefly discussing my experience with contracts and invoices in this timeframe at Hofstra University Law Library, I then report and analyze insightful responses from an AALL Technical Services–SIS listserv poll. This article ends by discussing tools that might help technical services colleagues “get ahead of it.”

## Background

In 2019, two esteemed colleagues left my workplace: our library director (who reviews contracts before moving them along to University administration) and our acquisitions librarian (who obtains contracts and processes invoices). A fantastic reference librarian filled in as interim director, and as assistant director of access and collections services, I filled in as acquisitions librarian.

Unbeknownst to us at the time, this unfortunate timing would—once the pandemic kicked in and the University instituted a hiring freeze—make working double-duty a necessity longer than anticipated. All this to say, our interim director and I worked together closely on contracts and invoices.

When the pandemic hit in early 2020, and librarians scrambled to figure out how to provide 100 percent remote library services, most vendors were understanding and helpful. Some offered free temporary access to ebooks or other online resources; others were gracious regarding invoice payment and allowed us to forego a contract or order form. In 2021, the COVID-19 vaccine became available, and as librarians began returning to campus, the spirit of solidarity largely continued from the previous year.

But beginning some time in 2022, after the omicron variant had run wild the preceding winter, I began to feel—to notice—that things were changing.

Contracts and invoices started taking longer, on both the vendor side and the law library side. We began to receive more vendor accounts-receivable emails asking when to expect payment for invoices than we previously had. Emails to vendors requesting renewal invoices went unanswered.

Vendors began making easily avoidable mistakes. For example, earlier this year we received a

snail mail letter from a vendor stating our account was soon to be given to a collection agency due to non-payment. In fact, we had paid the invoice in question eight or nine months prior. On another occasion, a vendor split our annual payment for a database into two invoices without telling us, and making the situation even more confusing, they sent us only one of the two invoices. That situation took months to figure out.

But I digress: The main takeaway for my department is that contracts and invoices now take longer to process than they did before the pandemic, and this prompted me to wonder if other law libraries have been experiencing the same difficulty.

## Poll Data

In April 2023, I sent a Google Poll to the TS–SIS listserv that asked four questions. I created the poll so that respondents remained anonymous: it did not ask for an institutional affiliation or email address in an effort to prioritize honest feedback. Eight colleagues responded to the poll, and the data is analyzed below.

### 1. How responsive are vendors to requests for contracts and invoices in 2023 compared to 2019? [multiple choice]

The replies to this question were mixed, with two librarians (25%) answering “More Responsive,” three (37.5%) “Less Responsive,” and three (37.5%) “About the Same.”

### 2. If any, what vendor dynamics have changed in 2023 compared to 2019 that have affected turnaround time for contracts and invoices? [short answer]

I hypothesized that I would receive responses about vendor staffing and other post-pandemic labor issues. Sure enough, many respondents mentioned matters such as “Turnover & shrinkages in [vendor] staff, and overburdened staff seem to be the main factors” affecting vendor performance. Another colleague writes that “Some vendors have ... consolidated divisions and that has resulted in erroneous charges which take months to clear.”



One respondent identified a different but related issue: "...the mail is slower, so for vendors who insist on using USPS for invoice delivery, we often need a faster internal invoice processing turnaround time to meet deadlines." My library has encountered this frustration as well: Email has existed for over 30 years; why we are still receiving paper invoices is a mystery. Perhaps with a concerted effort we can convince vendors to send invoices only by email, a welcome change that would benefit law libraries and vendors alike.

### **3. After receiving contracts and invoices, how long does it take your law library to process them in 2023 compared to 2019? [multiple choice]**

Four of eight respondents (50%) stated they take longer to process in 2023 compared to 2019; only one (12.5%) reported that it takes less time.

### **4. If any, what law library dynamics have changed in 2023 compared to 2019 that have affected turnaround time for contracts and invoices? [short answer]**

Significantly, four of the eight answers (50%) mention their accounts payable department taking longer. This answer is exemplary: "The dynamics are not in the library, but rather the campus A/P department, which pays all invoices for the entire campus. They suffered countless resignations and have had a very hard time recruiting new employees. Payment turnaround now takes at least double what it was before the pandemic."

My experience is similar; our accounts payable department also takes twice as long as it used to before the pandemic. This dynamic, in addition to the difficulty of obtaining contracts and invoices from vendors, plus a longer processing time on the law library side, has made me realize we must start the process of obtaining contracts and invoices much earlier than we previously needed to.

### **Suggestions for "Getting Ahead of It"**

When I began filling in for our retired acquisitions librarian in January 2020, the first thing I did was create a two-page renewal calendar in a Word

document. The first page is January to June, and the second page July to December. Each month is bold and underlined, and all the renewals that fall in a given month are listed under it. I needed this even before the pandemic started, but now that things take so much longer, having a renewal calendar is essential. If you don't have one already, creating a renewal calendar is my #1 recommendation to help your library get ahead of things.

One particular challenge this has helped us with is renewing the big three in the fall semester: Lexis, Westlaw (with LMA!), and Bloomberg Law. In May we are focused on final exams, in the summer colleagues are on vacation, and when school fires back up in the fall we naturally get preoccupied with student and faculty service points. All this to say, we now reach out to vendors for fall renewals in spring. This also helps us stay ahead of things.

Another indispensable document I created in January 2020 was an "All Invoices" spreadsheet that is searchable by invoice number, amount, vendor, title, etc. Now when a vendor rep reaches out asking for payment, a quick search in the All Invoices spreadsheet usually shows that we have already processed the invoice and submitted it to Accounts Payable.

My third and final suggestion to help get ahead of things is an old-fashioned strategy: a simple telephone call. When vendor reps don't respond to emails (which is easy to do—asynchronous communication), calling a general customer service telephone number (synchronous communication) keeps them on the line until we can arrive at some kind of resolution. This can sometimes result in being on hold for lengthy amounts of time, but if it solves the problem at hand, it is worth it.

Looking ahead, I recently received news from our administration that they are planning to implement an online contract/invoice processing software module that will, finally, allow us to monitor the progress of contracts and invoices within the system. We hope that this digital system, in addition to the strategies mentioned above, will help us get ahead of things even more.



# THE U.S. PATENT AND TRADEMARK OFFICE: IP RESOURCES THAT SUPPORT INNOVATION, INCLUSION, AND YOUR LIBRARY

CAROL OTTOLENGHI

DIRECTOR OF LIBRARY SERVICES  
OHIO ATTORNEY GENERAL'S OFFICE

Following our introductory piece, “Use Vendors Hiding in Plain Sight to Get Great Resources and “Sell” Library Services,” in the **March 2023** issue of *The CRIV Sheet*, this article continues a series on *Marketing Your Library with Resources from Government Vendors*.

As we saw with the U.S. Department of Veterans Affairs in the prior article, once we recognize government agencies as information “vendors,” we discover a wealth of well-researched, topic-specific resources that are available to libraries, and often the general public, at little or no cost. Below, I highlight several of the many resources available from the U.S. Patent and Trademark Office (USPTO), and suggest ways that academic, firm, and government law libraries can apply these resources to increase our offerings, contribute to our larger organization’s outreach, and demonstrate a solid return on our organizations’ investments (ROI) in the library.

## Start at the Beginning

“The devil’s in the details” may be an apt description of patent and trademark work.

Fortunately, the USPTO’s website helps users tackle many intellectual property (IP) questions with detailed information, how-to’s, databases, and programming. Plenty is there for multiple audiences—independent inventors, students, researchers, and long-time practitioners—which means librarians can leverage it to reach multiple library stakeholders.

The homepage at [www.USPTO.gov](http://www.USPTO.gov) is organized under four tabs: Patents, Trademarks, IP Policy, and Learning and Resources. The first three of these link to lots of topic-specific ready reference, FAQs, application forms, toolkits, and databases. They are very handy, but I find the Learning and

Resources tab the most convenient because it subdivides USPTO resources into the following categories:

- Resources by Audience
- Help by Topic
- Services and Publications
- Tools and Links

The Tools and Links box includes how-to videos, guidance documents, and a [glossary](#). This glossary is extremely useful for two related reasons. First, it can ensure that everyone is speaking the same language. Second, the glossary is a subtle reminder to clarify the meaning of certain abbreviations, acronyms, and jargon in an IP context, as opposed to a legal or other context. For example, “ABA #” has nothing to do with the American Bar Association, and the specific, statutorily founded definition of “invention” is provided.

## Wade into the Weeds

It is impossible to mention here all of the in-depth resources at USPTO.gov. However, three excellent ones are:

- [The Manual of Patent Examining Procedure \(MPEP\), 9th ed., Feb. 2023](#)

Patent examiners follow the policies and procedures in this searchable manual when evaluating patent applications. Inventors, attorneys, and students use it to minimize avoidable application errors.

- [The Law School Clinic Certification Program](#)

Currently, over 60 law schools participate in this program to bring pro bono IP legal services to inventors, entrepreneurs, and small businesses. Law schools interested in offering such a clinic to their students and communities may [apply now](#) through **January 5, 2024**.

## • Events Calendar

CLE may be available, depending on individual state requirements. Recent and upcoming programs include:

- Agents and Attorneys: Learn to Think like a Patent Examiner with STEPP's Four-Day Course
- A Mock Oral Argument Practicum, part of the Legal Experience and Advancement Program (LEAP), which allows advocates with less than seven years of experience to practice oral arguments before the Patent Trial and Appeal Board (PTAB)
- AI/ET Partnership Series #3: AI-Driven Innovation
- Trademark Basics

## Supporting Diversity and Inclusion Makes Good Business Sense

*"We need to expand innovation inclusively, reaching people where they are with the resources to participate in our innovation ecosystem. It is the key to unleashing the potential of every American, to creating jobs, and to economic prosperity."*

—Kathi Vidal, Undersecretary of Commerce for Intellectual Property and Director of the USPTO

I was surprised to discover that the USPTO is a formidable agent of inclusion and diversity. The barriers that can prevent people with innovative ideas from patenting their creations are significant, and many USPTO initiatives are designed to lower these barriers. For example:

## • Patent Pro Bono Program

This nationwide program matches volunteer practitioners with inventors for the purpose of securing patent protection. CLE credit is available to participating volunteers but depends on individual state requirements.

The program has proved successful in expanding both innovation and inclusivity. In 2022, applicants who responded to a survey **self-identified as:**

- African American or Black – 35%
- Hispanic – 14%

- Asian or Pacific Islander – 6%
- Native American – 1.5%

In addition, though only 13 percent of all inventors named on U.S. patents are women, 43 percent of the 2022 Patent Pro Bono Program applicants self-identified as female.

## • USPTO Office of Innovation Outreach (OIO)

OIO creates programming that helps independent inventors, small businesses, entrepreneurs, and underrepresented or underserved populations to better understand, secure, and utilize IP resources. Specific programming addresses:

- Asian-American, Native Hawaiian and Pacific Islander (AANHPI) Innovation and Entrepreneurship
- Black Innovation and Entrepreneurship
- Hispanic Innovation and Entrepreneurship
- Invention-Con
- Proud Innovation
- Together in Innovation
- Veterans Innovation and Entrepreneurship
- Women's Entrepreneurship

Along with its own programming, OIO collaborates with other agencies, organizations, and universities. Contact them to find out more at [InnovationOutreach@uspto.gov](mailto:InnovationOutreach@uspto.gov) or 571.272.8033.

## • Patent and Trademark Resource Center Program (PTRC)

The PTRC collaborates with a nationwide network of public, state, and academic libraries qualified to offer patent and trademark training, resources and reference assistance, and outreach to all. Participating libraries are in almost every state, providing access to rural and less-populated areas as well as urban ones. While these libraries do not offer legal advice, they do provide:

- Access to **Patent Public Search** and **Trademark Electronic Search System (TESS)**
- Explanations about the application process and fee schedule

- Demonstrations on using search tools to conduct a patent or trademark search, find assignee information, and track current research by company or nonprofit
- A directory of local patent attorneys who are licensed to practice before the USPTO
- Classes on intellectual property (varies by location)
- Instruction on conducting historical research on patents and trademarks

### Using USPTO Resources to Demonstrate Strong Library ROI

As librarians, we know that we exist to support our parent organizations and outside communities by providing necessary, accurate information and instruction in a timely fashion. As librarians in the digital age, we also know that it is no longer enough for libraries to just do good work. If libraries are to thrive, we must be seen doing good work. We must show our library's stakeholders—employees, patrons, funders, decision-makers, etc.—that the library provides reliable and cost-effective information and opportunities for the entire organization.

We demonstrate our value when we tap USPTO resources to:

- Provide independent inventors with resources to protect their innovations
- Promote business collaborations between our larger organizations and IP creators
- Support legal clinic experiences
- Keep new and experienced practitioners aware of CLE and educational opportunities
- Inform the organization's articles and blog posts
- Highlight additional under-used IP resources that come as part of commercial packages to improve product cost-effectiveness and increase library outreach
- Encourage colleagues and students to recognize and bypass the socioeconomic and geographic barriers to the patent process
- Remind stakeholders that we are a reliable source of low-cost, high-quality IP information resources and education

The possibilities are limited only by our creativity. If you share these resources with your library's stakeholders and would like to share your experience, please email me at [carol.ottolenghi@ohioAGO.gov](mailto:carol.ottolenghi@ohioAGO.gov).

## THE CRIV SHEET RECOMMENDED PROGRAMS FOR THE 2023 AALL ANNUAL MEETING

The [116th AALL Annual Meeting & Conference](#) will be held this summer in Boston, July 15-18, with the theme "Map Our Future." We hope you will take the time to check out the following programs recommended by *The CRIV Sheet* for their relevance to the presentation, publication, or purchasing of legal information. Program titles below are linked to more information on the Conference website. If you attend these or other programs or events you think may be of interest to *The CRIV Sheet* readers, please con-

sider writing a synopsis or review to appear in our November 2023 issue. Reach out to *The CRIV Sheet* co-editors, [Andrew Christensen](#) or [Ashley Arrington](#), about this opportunity. Please note: The information below is from the Conference agenda/schedule published on the AALL website as of mid-May. If we become aware of any changes to these programs, they will be noted on *The CRIV Blog* as soon as possible. Events are presented in order of their scheduled time (EDT/local time in Boston).

## THE CROSSROADS OF LICENSING AND COPYRIGHT

**Sunday, July 16, 2023**

**11:30am – 12:30pm EDT**

**Location: Hynes-207**

Copyright's First Sale doctrine is fundamental to how libraries operate because it allows libraries to lend materials they purchase to their patrons. How has the dramatic shift away from purchasing print materials and toward expansive electronic licensing agreements affected libraries' use of this doctrine, and their ability to perform essential services? What does copyright law have to say about how we can respond to challenges that this change might create?

This program will explore the use of licensing agreements in law libraries, particularly discussing the fate of the Maryland licensing law and the attempts by other states to pass similar laws, and how copyright law interacts with licensing agreements.

**Target Audience:** This program can potentially benefit any librarian because it will discuss the significant role played by copyright laws and electronic resource licensing in the shaping of collection development decisions and the continuing shift to library collections dominated by digital materials that are managed by licenses. More specifically, it can help librarians who work in collection development and management by providing insight in legal information resource licenses.

### HOT TOPIC: MOVING BEYOND PRINT

**Sunday, July 16, 2023**

**3:15pm – 4:15pm EDT**


**Location: Hynes-302**

Libraries have been moving to electronic resources for decades. The exigencies of the pandemic have accelerated this transition so much that it's important to have a new conversation about what it means to move beyond print. Natural characteristics of print that tend to disappear when con-

#### Takeaways:

- Participants will be able to identify how copyright law interacts with licensing agreements and understand the related, but not identical, sets of rights and restrictions that govern how licensed resources can be used and distributed.
- Participants will be able to understand and evaluate the benefits, risks, and viability of current and proposed legislation to regulate pricing of electronic resource licenses through an analysis and review of the District Court's finding in *Association of American Publishers, Inc. v. Brian E. Frosh*, which struck down legislation passed by the State of Maryland that required publishers to offer ebooks to public libraries on "reasonable terms" because it conflicted with federal copyright law.
- Participants will be able to incorporate their understanding of the Maryland decision and its implications and impact on decision-making practices such as purchasing and negotiating contracts for databases, ebooks, and other electronic resources at their respective institutions. features

tent is provided electronically—e.g., versioning, preservation, ownership, security, and privacy of access, shareability, and lendability—must now be explicitly requested and guaranteed in electronic resource licenses. These important considerations are only part of the increasing challenge of vendor relations as print disappears. With no alternative for access to the content, how can libraries keep from being disadvantaged in negotiations? What options remain for meaningful pricing benchmarks, and what can libraries do to rein in



price increases? Is it possible to keep print publications alive when the electronic alternatives are not sufficient? This panel discussion will include law librarians experienced in multiple environments, including members of AALL's Committee on Relations with Information Vendors (CRIV), and the President of the NELLCO Law Library Consortium. The panel will seek to illuminate several perspectives on the transition away from print resources and to suggest some goals for the near future.

**Target Audience:** Library directors or managers, especially those with responsibility for electronic

resources contracts; librarians involved in collection development, strategic planning.

**Takeaways:**

- Attendees will be able to discuss with vendors issues surrounding preservation, discoverability, and accessibility.
- Attendees will understand unique challenges facing federal and court libraries in moving beyond print.
- Attendees will know how to access tools and resources for supporting vendor relations.

## TS-SIS HOT TOPIC: COUNTERINTUITIVE: DISCUSSING THE LACK OF STANDARDIZATION IN VENDOR-SUPPLIED USAGE STATISTICS

**Sunday, July 16, 2023**

**5:30pm – 6:30pm EDT**

**Location: Marriott-Suffolk**

When library budgets are flat or shrinking, assessing the value of electronic resources becomes especially important, as this is how we communicate the value of the library and library resources to external stakeholders. However, depending on what type of statistics the resources offer, obtaining statistics for electronic resources can be difficult or impossible.

Counting online usage of Networked Electronic Resources (COUNTER) makes usage reports an effective tool for analyzing patron behavior and preferences in databases. A great weakness in legal databases, however, is the lack of COUNT-

ER-compliant reporting, and sometimes the lack of any reporting at all, which leaves us with a big question: how can we take the statistics available to us, regardless of compliance, and transform them into a viable assessment tool, especially regarding subscription cancellation decisions? Unless reports are COUNTER-compliant, there is no way of knowing if searches on one report are equivalent to searches on another report. There are obvious difficulties in choosing whether to cancel or keep databases when usage data is not standardized.

This TS/LSRD-SISs hot topic panel will discuss how to gather meaningful statistics when COUNTER reports are not available, as well as how to encourage our vendors to supply COUNTER-compliant statistics.

## HUNTING AND GATHERING ON THE LEGAL INFORMATION SAVANNAH

**Monday, July 17, 2023**

**10:45am – 11:45am EDT**

**Location: Hynes-304**

Research in massive online legal research platforms requires entering a multifaceted construct, where user-interface design and an array of algorithms guide the experience. What is it like for

novice researchers to research real-world legal problems and attempt to come to a legal conclusion in these four platforms: Bloomberg Law, Fastcase, Lexis Advance, and Westlaw? We will discuss the study in Hunting and Gathering on the Legal information Savannah, which investigated this question with representatives from each platform, and will investigate the interplay between

user interface design and algorithms. Audience questions will dominate the discussion, and may be submitted in advance to [susan.mart@colorado.edu](mailto:susan.mart@colorado.edu).

**Target Audience:** Anyone who teaches or trains law students or young lawyers, from the academic, firm, and government sectors of law librarianship, as well as law librarians in any sector who focus on research.

**Takeaways:**

- Participants will be able to describe and better understand the interplay between user interfaces and both search algorithms and machine-learning algorithms in legal research platforms.
- Participants will be able to apply the results of a new study of the research process in legal research platforms to teaching legal research skills to students and lawyers.
- Participants will be able to apply critical legal research theories in researching and teaching.

## GENERATIVE AI AND KM: A NEW PARADIGM? (SPONSORED BY THOMSON REUTERS)

**Monday, July 17, 2023**

**1:15pm – 2:15pm EDT**

**Location: Hynes-311**

Earlier this year, generative AI and popular platforms like ChatGPT burst onto the scene in a big way, offering a new way to generate content and provide users with plain language answers to their questions. The potential use cases in law are vast—and perhaps none are bigger than the knowledge management (KM) system, already one of the largest repositories for legal information and data. This program explores what generative AI could mean for KM, the opportunities its use presents, and the risks that it could pose when dealing with sensitive data.

**Target Audience:** Knowledge management professionals at law firms or law schools; informa-

tion and data professionals at law firms or law schools; and those interested in new or emerging technologies.

**Takeaways:**

- Attendees will gain a base line understanding of the effect Generative AI will have on the future of knowledge management.
- Attendees will understand the capability of new generative AI tools such as ChatGPT or Microsoft's Copilot to provide opportunities to retrieve and explain organizational data in a way that can save ample amounts of time and money—if used correctly.
- Attendees will learn about the risks of implementing these new tools, from accuracy to handling sensitive data, pleadings, and motions documents in H2 2022 to our leading primary law collection.

## COOL TOOLS CAFÉ


**Monday, July 17, 2023**

**1:15pm – 2:15pm EDT**

**Location: Hynes-312**

In what has become an AALL tradition, the Cool Tools Café will demonstrate all kinds of emerging or existing technologies from librarians who used them in their own libraries. Featuring the

latest tools, gadgets, and apps, learn why these technologies are useful, how they work, and ways your library might implement them. Past years' tools focused on every aspect of libraries, including legal research, collaboration, marketing services, instruction, productivity, citations, presentations, and website functionality.



**Target Audience:** Individuals from all types of law library settings (academic, public, and private). Librarians of all experience levels: from those who are tech savvy to beginner librarians who want to become more comfortable with technology and learn about easily adoptable tools that can be used to improve library websites, marketing, services, or instruction sessions.

**Takeaways:**

- Participants will test existing and emerging technologies libraries have implemented to improve library services.
- Participants will evaluate these technologies in a small group setting and assess their utility.
- Participants will select and implement these technologies in their home libraries.

## DATA 411: TERMINOLOGY, CODING, AND TELLING STORIES

**Monday, July 17, 2023**

**1:15pm – 2:15pm EDT**

**Location: Hynes-306**

Today, data is everywhere, and it can assist you with your day-to-day work and communicate important information to others in your organization. Suppose you do not understand the language of data. If this is true, you will also have difficulty grasping data's fundamental value and visualization techniques that best communicate that value to stakeholders. In this program, panelists will use a game show style format to share critical data terminology and definitions so that the audience is actively involved with the data vocabulary and examples. After the terminology exposure to the fundamental aspects of quantitative and qualitative data, panelists will discuss coding your data to make it easier to work with and communicate its value to others. Finally, the audience can evalu-

ate the best and most effective visualization tools (charts) for specific data sets by comparing and contrasting "failing" graphs with those who tell a story with the data.

**Target Audience:** This program is for individuals who want to learn more about all aspects of data and those interested in a refresher on data basics.

**Takeaways:**

- Participants will receive key terminology and definitions that serve as the foundation for understanding and working with data.
- Participants will see the value of coding their data to assist with further analysis and sharing with stakeholders.
- Participants will engage in discussion about why specific charts communicate certain stories with the data.

## COLLABORATING WITH VENDORS: MARKETING, USER NEEDS, AND PRODUCT DEVELOPMENT

**Monday, July 17, 2023**

**3:30pm – 4:30pm EDT**

**Location: Hynes-306**

Information vendors and law librarians butt heads sometimes—contract negotiations, technical difficulties, and marketing messaging can be contentious. But because publishers play such a central role in library collections and legal institutions, librarians must embrace these relationships and

find collaborative ways to develop even better legal information products. This program will gather vendors and law librarians for a panel discussion of high-level issues on customer relationships, product development, and the business of legal information, independent of any single platform.

**Target Audience:** Across all library types, librarians tasked with managing vendor relationships and librarians tasked with training responsibil-

ities will benefit most. Researchers and legal subject-matter experts will also benefit by better understanding issues with giving specific feedback and collaborating with vendors on product development.

**Takeaways:**

- Participants will learn about creative ways vendors and their customers can engage with each other to better understand and develop content and platforms.

- Participants will learn about balancing vendor-led programming and vendor-produced training materials with objective insights into the information landscape.
- Participants will gain insight into the knowledge management challenges vendors face in creating and maintaining their tools and services. “Favorites” and “Group Content” sections added to Saved Content panel

## HIGHER STANDARDS: SALI'S LEGAL-DATA STANDARDIZATION ACROSS THE LEGAL INDUSTRY

**Monday, July 17, 2023**

**3:30pm – 4:30pm EDT**

**Location: Hynes-312**

Want to learn more about SALI, including why the legal ecosystem's largest vendors (e.g., Thomson Reuters, LexisNexis, Fastcase, NetDocuments, Litera), firms (e.g., Perkins Coie, Ogletree Deakins, Goulston Storrs), and corporations (e.g., Microsoft) are all adopting SALI's taxonomy/ontology, as a legal-data standard? Librarians frequently use taxonomies (e.g., MARC records, RDA Toolkit) as our profession's framework. SALI's rich ontology of 10,000+ tags describe both (1) substantive law and (2) the business of law. As a standard—that is free and open source—SALI is making this taxonomy/ontology of tags, permitting additional innovations (e.g., AI, NLP, LLMs) to be built on top of SALI's rich dataset. Learn how Thomson Reuters plans to implement its SALI implementation across each of its legal products. Also learn how firms (e.g., Ogletree Deakins, Frost Brown Todd, Clifford Chance) and corporations (e.g., Microsoft) are implementing SALI. Where law librarians implement SALI in their organizations, they're able to demonstrate—to the tech side of legal support—that librarians' subject-matter expertise is necessary to enrich an organization's systems. SALI implementation is an easy way to demonstrate that value.

**Target Audience:** Really, anyone in a law firm (e.g., knowledge management, lawyers, business development, pricing) would be interested in learning about SALI. Each persona can facilitate the adoption of the rich taxonomy that includes specific terms of art. SALI covers both substantive law and business of law—so the audience can include managers, knowledge management, law library directors, technical service librarians, and research librarians.

**Takeaways:**

- Participants will be able to explain why SALI is being adopted by the largest legal information vendors, law firms, and corporations. They will see how vendors, firms, and corporations are all adopting this legal-data standard.
- Participants will understand how tagging using this standard will both make internal searches more effective and permit legal-ecosystem interoperability.
- Participants will learn how to map their organizations' current taxonomies to SALI's free, open-source taxonomy/ontology, permitting better interoperability with others in the legal ecosystem. courts use different terms than your search to refer to the same concept.





## HOT TOPIC: THE IMPACT OF GENERATIVE AI FOR ACCESS TO JUSTICE

**Tuesday, July 18, 2023**

**8:30am – 9:30am EDT**

**Location: Hynes-302**

The Legal Services Corporation (LSC) reports that 92 percent of the civil legal problems faced by low-income Americans are un- or under-served, and 53 percent of those Americans don't believe they could find an affordable lawyer. Despite noble missions, passionate donor bases, and committed law school clinic participant staff, nonprofit legal organizations still often struggle to put a dent in their backlogs. At this present time—when expertly-developed legal AI is already handling substantive legal tasks to dramatically increase the efficiency of law firms and legal departments across the country—we need to consider the real-world impact of this generative AI for A2J. But legal AI is not alone. Generic AI tools like ChatGPT continue to enjoy attention from the legal community.

Join Casetext, the California Innocence Project, and LexisNexis for a ranging conversation of the capabilities of today's most advanced legal AI technology, and actual use cases for applying this

technology in the context of nonprofit legal organizations.

**Target Audience:** This program will benefit anyone interested in learning more about generative AI and its use in both generic tools like ChatGPT and more advanced legal AI, as well as anyone interested in how generative AI can be used for access to justice initiatives.

### **Takeaways:**

- Participants will be able to describe at least three ways that AI is being used by legal practitioners.
- Participants will be able to discuss the use of generative AI for access to justice initiatives.
- Participants will be able to compare and contrast the use of legal AI technology with generic AI tools like ChatGPT.



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