ISSUE 241- FALL 2016

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FROM THE EDITORS

JUANITA HARRELL, PHILIP JOHNSON, and SCOTT VANDERLIN

It’s difficult to believe that fall lasts until December 21 when we’ve already experienced sub-zero temperatures here in Chicago, but here we are. Perhaps this issue of the CALL Bulletin will be a pleasant reminder of warmer times.

In fact, this issue comprises our final recap of the AALL proceedings this summer with two grantee reports from Heidi Kuehl and Matthew Timko, a recap of Cool Tools Café from Debbie Ginsberg, and an item on the award of Legislator of the Year to U.S. representative Mike Quigley at the beginning of August.

We also have a featured piece from Eugene Giudice on the nature of transition that conveniently dovetails with the changing of the seasons. Donna Tuke writes on tax deductions for law librarians, Juanita Harrell covers mandatory e-filing, and of course, we have a roundup of committee news. Also, be sure to check out the nominees for the 2017-2018 CALL executive board.

Stay warm out there, and we’ll be back in a couple of months with the 70th anniversary issue!

Philip Johnson
Co-editor, CALL Bulletin
Dear CALL colleagues,

One of the most commonly observed phenomena about professional work in the 21st century is the increasing specialization of different jobs, and that is certainly something we have seen in our law librarian community, even within individual law libraries and organizations. However, despite this increasing specialization, there are still things we share that bind us together as law librarians. One of the challenges of the recent AALL rebranding effort was identifying those traits that define all of our work and figuring out how to communicate our value to others outside the profession. AALL’s new tagline, “Your Legal Knowledge Network,” manages to capture a lot in four simple words, and it applies just as well to AALL chapters like CALL as it does to the national organization.

First of all, the organization is indeed yours. CALL is what it is because of the input and the participation of all of our members. One of the great things about being active in a local chapter is that the smaller scale allows individuals to make a more noticeable impact and have their voices heard more immediately. Any CALL members who want to share some knowledge or opinions or have something they want to learn more about from others are encouraged to propose a continuing education program, a CALL Bulletin article, or another type of CALL initiative. If you want to learn more about CALL and get more involved in the organization, you can volunteer for a CALL committee or participate in one of our community service projects.
Anyone who just has suggestions or questions for CALL should please feel free to contact me or any of the Executive Board members about any issues. Later in 2017, we will be reaching out to CALL members to hear your thoughts and goals as we put together a strategic plan for CALL for the next three years. We want to hear from everyone about the directions you want CALL to take so that we continue to confidently say that we are “your” organization.

Next, I’d like to skip ahead to focus on the last of the four words in AALL’s new tagline: network. The word “network” denotes a sense of interconnectedness and a common purpose. CALL includes a great variety of law librarians and legal information professionals all with ties to the Chicago area. In my view, this diversity is one of the great strengths of CALL because we have so much to learn from each other.

Much, but not all, of what we have to share and learn is related to the middle two words of the tagline: legal knowledge. In our current environment, those two words encompass a wide spectrum. CALL committees are working hard to offer education programs and other learning opportunities that address different types of knowledge that should help members enhance their skills and expertise. Watch out for announcements about upcoming programs from the Continuing Education and Mentorship and Leadership Development committees in early 2017. CALL will also soon be offering some educational content online through webinars and other means, so that members who do not work in downtown Chicago or may have a difficult time leaving the office will have the chance to attend some of these programs.

In addition to these great programs, we have a lot more to look forward to in 2017. Most importantly, it will mark 70 years since CALL’s formation in 1947. We’ll have a special anniversary issue of the CALL Bulletin, as well as a celebration at our May business meeting. I hope to see many of you there.

Best,
Todd
CALL EXECUTIVE BOARD MEETING MINUTES – SEPTEMBER 2016

Complete, up-to-date CALL Board meeting minutes are available on the CALL website.

- AALL Headquarters, 105 W. Adams St., Suite 3300 (enter on Clark St.)
- September 13, 2016, 9:00 a.m.

Board Members Present

- Todd Ito
- Clare Willis
- Julie Pabarja
- Konya Lafferty Moss
- Tom Gaylord
- Lindsey Carpino
- Diana Koppang

Board Members Absent

- None

Guests (via teleconference)

- Jesse Bowman
- Carolyn Hersch
- Eugene Giudice

Summary

Treasurer’s Report (Section IV):

1. Harris Bank Balance as of August 31, 2016: $29,818.83
2. Net Income as of August 31, 2016: $2,570.35
3. Membership Numbers as of August 31, 2016: Due to changeover to Wild Apricot for registration, membership numbers were not reported this month.

Significant Actions

- None
CALL EXECUTIVE BOARD MEETING MINUTES – OCTOBER 2016

*Complete, up-to-date CALL Board meeting minutes are available on the [CALL website]*.

- AALL Headquarters, 105 W. Adams St., Suite 3300 (enter on Clark St.)
- October 11, 2016, 9:00 a.m.

**Board Members Present**

- Todd Ito
- Clare Willis
- Julie Pabarja
- Konya Lafferty Moss
- Tom Gaylord
- Lindsey Carpino
- Diana Koppang

**Board Members Absent**

- None

**Guests**

- Margaret Schilt
- Therese Clark Arado (via teleconference)

**Summary**

Treasurer’s Report (Section IV):

1. Harris Bank Balance as of September 30, 2016: $32,423.97
2. Net Income as of September 30, 2016: $551.92
3. Membership Numbers as of September 30, 2016: 266 (55 renewals; 0 new members)

**Significant Actions**

- None
CALL held its May Business Meeting at Harry Caray’s Italian Steakhouse, 25 West Kinzie Avenue, on May 12, 2016. President Julie Pabarja called the meeting to order at noon and welcomed new CALL members–Anita Calderon (Michael Best & Friedrich) and Sarah Andeen (Chapman & Cutler).

President’s Announcements

President Julie Pabarja reported that we are progressing with the adoption of Wild Apricot for business meeting registrations, the CALL directory, and membership renewals. Credit card usage for payments of registrations and renewals has increased with the use of Wild Apricot in place of payments by check.

Regarding the AALL Annual Meeting, Julie reminded the membership that Early Bird registration ends June 3rd. She encouraged first time attendees to attend the pre-conference event, Conference of Newer Law Librarians (CONELL). Three AALL leaders, who are also CALL members, were present at the meeting to promote attendance at the conference in July–Keith Ann Stiverson (AALL president), June Liebert (chair of the Annual Meeting Program Committee), and Jamie Sommer (co-chair of the Local Arrangements Committee).

Jamie Sommer, on behalf of the hospitality subcommittee of the Local Arrangements Committee (LAC), asked for donations for the hospitality booth raffles at AALL. The hospitality booth is staffed by volunteers who provide a warm welcome to out-of-town attendees at the...
annual meeting with tips on where to eat, shopping, and local attractions. Carolyn Hersch, co-chair of the volunteer subcommittee of the LAC, followed up on Jamie’s request with a call for volunteers to staff the hospitality booth.

Clare Willis, incoming CALL Vice President, announced CALL’s Trivia Night at AALL. The event will be on Sunday evening of the conference from 8:00 p.m. to 10:30 p.m. at Timothy O’Toole’s. This will be CALL’s chance to prove we have the brightest and best law librarians in the country! Some free drinks and free food will be provided. Clare welcomed all CALL members to attend—whether or not they’re attending the AALL Annual Meeting.

Meeting Sponsor

Vice-president/president-elect Todd Ito introduced Sean Hearon of Wolters Kluwer and thanked them for their generous sponsorship of today’s business meeting.

Meeting Speaker: Jason Kunesh (@jdkunesh)

Jason Kunesh, currently CEO of Public Good Software, has also served as the Director of User Experience (UX) at Obama for America, was a founder of Fuzzy Math, on the founding team of The Point (later evolving into Groupon), an early designer at Orbitz, an adjunct faculty member at DePaul University and the School of the Art Institute of Chicago. And, possibly a first for a CALL Speaker, Mr. Kunesh worked as a bouncer at the Green Mill.

Mr. Kunesh’s presentation was titled “Politics, Technology, Libraries, & Startups—How to Innovate in Your Workspace”—a lively talk on how he was inspired to innovate in this space.

He was first motivated when a paperwork error at the hospital where his daughter was born prematurely created a whopping incorrect bill of half a million dollars. According to the hospital this error was quite common. He thought, “There must be a better way,” and so was born Fuzzy Math.

He continued to work in the tech industry, but kept an eye out for other inspiring works. He interviewed for the Obama for America campaign (Obama’s 2012 re-election). The campaign’s plan was: Respect. Empower. Include. Win. What they needed? Register. Persuade. Turnout. Volunteer. Donate.

In past campaigns everything was done on paper, such as sign-up lists for volunteers. They built “neighborhood teams” with an octopus-like diagram consisting of various positions at the local level such as phone bank person, data captain, comfort captain (bake cookies), etc. With this structure, the volunteers were like entrepreneurs using social media to reach out to the
community in a way that was new. Kunesh’s team created dashboard tools that volunteers could use to self-organize.

Behind the scenes, the data service he led helped create much more dynamic profiles that could be easily utilized by these teams of volunteers. For example, if you donated to the campaign on Monday, the phone bank person would know not to contact you for more on Tuesday (or hopefully at least a few days).

The campaign was successful! Obama won 270 of 538 electoral votes in the 2012 election.

So what do UX designers like Mr. Kunesh do? He described it as mostly exercises in diplomacy and consensus with the “actual work”—creating deliverables—being the smallest part of the job. Kunesh learned throughout this campaign and through his other projects over the years that “the value of community is immeasurable.” He pointed out that CALL has already recognized this value and urged the community to continue those efforts.

Mr. Kunesh’s current company—Public Good Software—places buttons on online article pages about serious matters that range from shootings to wildlife preservation. Those buttons then link to community organizations that are striving to work toward solutions for these problems. Readers can then make donations to those organizations.

Mr. Kunesh provided advice on running and participating on a strong team, especially in the user design field. “Give agency”—do not create a top-down structure. “Be measurable”—be able to measure the impact of your actions and how the efforts align with business or organizational goals. “Encourage dissent”—if everyone is nodding agreement in a meeting, then you shouldn’t be having that meeting. “Be happy!”—life is too short! Being happy is an act of bravery and that act can be hugely impactful for the people around you.

CALL Member Questions

*How can these concepts be explained to the public?*

Mr. Kunesh noted that it depends if they want to have the details explained or not. For example, you may want to know what’s in your meal at a fancy restaurant, but you probably don’t want to know what’s in your McDonald’s Value Meal. You have to tailor the explanation to the needs of the user and the level of their skill sets.

*Any comment on the current Trump and Clinton presidential campaigns?*

Only that he is glad he’s not involved!
Are the UX principles he established being used by the Clinton campaign?

Many of the people who served on Obama’s campaign are serving Clinton’s campaign. But most of the innovation in the 2016 campaign is coming from the Bernie Sanders campaign team.

How does Public Good produce revenue?

Public Good charges a 5% fee for introducing a donor to a fund. They also work on corporate sponsorships.

In closing, Mr. Kunesh thanked CALL for the opportunity to be a part of our community.

Committee Announcements

Scott Vanderlin, CALL Bulletin

Scott informed the membership of a little known rule—per bylaws, the spring edition of the Bulletin may not be published until the weekly temperature averages 65 degrees. The membership were encouraged to keep their fingers crossed for warmer weather to hasten the publication date! Scott thanked Lyonette Louis-Jacques for her long and distinguished service (three years) as co-editor, during which time the Bulletin received a publication award. Co-editor Lindsey Carpino will be stepping down as she has been elected to the Board. New editors have stepped up—Philip Johnson and Juanita Harrell. Scott thanked the outgoing editors and incoming editors and encouraged all CALL members to send the Bulletin committee ideas for articles for future issues.

Julie Swanson, Community Service

The May meeting’s in kind donations will be given to Sit Stay Read. Cash donations will be given to Special Olympics Chicago. CALL will be putting together a team to participate in Race Judicata, a 5k walk/run that raises funds for the Chicago Volunteer Legal Services. The registration fee is $34 but if you join Team CALL you will only pay $20, with the remainder subsidized by CALL for this worthy cause. The deadline to register for the September 15th event is August 25th. More details will be sent to the membership by email in the weeks ahead.

Eugene Giudice, Meetings

Eugene reported another great year for CALL Business Meetings and asked for patience regarding using Wild Apricot as we all learn the new system for event registrations.
Presentation of Grants and Chapter Awards

The Grants and Chapter Awards were presented by CALL Past President Margaret Schilt.

Grant Recipients for 2015-2016

Eugene Giudice – AALL Business Skills Research Clinic (October 2015)

Clare Willis – AALL Leadership Academy (April 2016)

Debra Denslaw – AALL Chapter Grant for AALL Annual Meeting (July 2016)

Heidi Kuehl, Annie Mentkowski, and Matthew Timko – AALL Annual Meeting (July 2016)

Bill Schwesig – Yale Law Library’s Rare Book School (June 2016)

Chapter Awards for 2015-2016

(Thank to you Margaret Schilt for eloquently composing the details of the following award winners).

The Award for Outstanding In-House Publication was given to the William J. Campbell Library of the U.S. Courts, 7th Circuit, for their publication: the Daily Headlines E-Mail. The award was given to the library rather than to any individual librarian, as the Daily Headlines E-Mail is compiled and produced by all the librarians working together. John Klaus accepted the award on behalf of the 7th Circuit Library.

The Agnes and Harvey Reid Award for Outstanding Contribution to Law Librarianship is awarded to a librarian who has given outstanding service to CALL or who has made an outstanding contribution to law librarianship. The committee has chosen to honor Gretchen Van Dam with the 2016 Agnes and Harvey Reid Award.

Gretchen Van Dam began her career as a law librarian in 1990 in Detroit, Michigan. She moved to Chicago to the Chicago-Kent College of Law library in 1993, serving there until 2000, when she was appointed the Librarian of the Courts for the 7th Circuit Court of Appeals. Gretchen has overseen the operation of the Chicago 7th Circuit Library since then and now oversees all the satellite 7th Circuit Court libraries as well.

Gretchen has an impressive record of service to both AALL and to CALL. She has chaired three AALL Committees. She served as CALL’s President in 2009-2010 and on numerous CALL Committees. She has generously volunteered her time and talents as a speaker for AALL.
programs and CALL events, sharing her wisdom with the rest of us. She is a tireless advocate for law librarianship generally and a mentor to a generation of law librarians.

The **Award for Outstanding Lifetime Achievement in Law Librarianship** is given to a librarian who has made an outstanding contribution to the Chicago law library community either through provision of outstanding levels of service to the community directly or through CALL during the course of their career. CALL is extremely fortunate to have two librarians richly meeting these criteria: Barry Herbert, who retired early summer 2015, and Sally Holterhoff, who retired at the end of June, 2016.

**Barry Herbert** has been an active and productive participant in CALL for over 30 years, serving on many committees and as Treasurer of CALL from 2012-2014. He has also been an active member of AALL throughout his career. As Deputy Circuit Librarian at the Library of U.S. Courts of the Seventh Circuit, he has served as an excellent role model to other federal court librarians and was a strong and important voice in representing the value of law librarians to the federal judiciary. CALL is pleased to honor Barry with the Award for Outstanding Lifetime Achievement in Law Librarianship.

To say that **Sally Holterhoff** has been an active member of CALL and AALL over her 35 years of law librarianship is an exercise in understatement. Sally is a past AALL president and served two terms as an AALL Executive Board member. She also served two terms as a member of the Depository Library Council to the Public Printer, including a year as secretary; was AALL’s representative to the International Federation of Library Associations (IFLA) from 2011 to 2014; and is a member of the Standing Committee of the IFLA Section on Law Libraries. In 2014, she received AALL’s Robert L. Oakley Advocacy Award and Valparaiso University School of Law’s Distinguished Faculty Award. In 2015 during the AALL Conference in Philadelphia, Sally received the Marian Gould Gallagher Distinguished Service Award—AALL’s highest honor. Sally is also a member of the AALL Hall of Fame. CALL is pleased to honor Sally with the Award for Outstanding Lifetime Achievement in Law Librarianship.

**Transition of CALL Board Leadership**

President Julie Pabarja noted that she has had a great experience as president of CALL, with the best part being the opportunity to work with so many CALL members. Julie asked for all committee members to stand up and be recognized for their contributions and hard work. She added that she hopes that they will continue to be active and encourage other members to join them in their endeavors for CALL.

Julie thanked the Board members for all their hard work, inspiration and service to CALL. She recognized outgoing board members—Stephanie Crawford (treasurer), Robert Martin (director) and Margaret Schilt (past president)—for their dedication and contributions. Julie then
welcomed the incoming board members, the “new kids on the block”—Lindsey Carpino (director), Tom Gaylord (treasurer), and Clare Willis (vice president/president-elect).

Julie warmly noted that all of the CALL community has helped her become the leader she is today and that it’s been an unforgettable experience. But now it’s time to turn it over to a new leader. Julie introduced our new president, Todd Ito, and presented him with the gavel. Todd acknowledged that he is not the most talkative member of CALL but that we’ll all hear plenty from him over the next year! Todd then called Clare Willis to the podium for her first official duty as Vice President—drawing the business meeting raffle prize winners.

**Adjournment and Next Business Meeting**

Todd thanked the membership for their attendance and adjourned the meeting. The next CALL Business Meeting will be held at Nacional 27 on September 15, 2016.
CALL held its first business meeting of the 2016-2017 year at Nacional 27, 325 West Huron Street, on September 15, 2016. There were 81 registered attendees. President Todd Ito called the meeting to order at noon and welcomed new CALL members:

- Tom Duggan (Thomson Reuters)
- Elaine Knecht (Barclay Damon, LLP)
- Jennifer Koertge (Brinks Gilson & Lione)
- Martin Korn (Sheppard, Mullin, Richter & Hampton LLP)
- Ariana Lim (Professionals Library Service)
- David Sanborne (Cook County Law Library)

AALL past-president Keith Ann Stiverson thanked everyone for the best Annual Meeting ever! Through luck and her efforts, she hopes to bring the meeting back to Chicago sooner than later!
President’s Announcements

Wild Apricot/Membership Update

Todd issued a reminder about membership renewals. All members should have received an invoice by email by this time. Please contact Todd if you think there are any errors in the renewal form or if you have not yet received your renewal form.

Public Relations Committee Members Needed

Todd asked for volunteers for any of the CALL committees, but the Public Relations committee is in particular need of additional members. The PR committee has a number of responsibilities that are divided among the committee members—taking pictures at CALL events, Tweeting, posting other social media sites about events or upcoming events, finding other ways to attract new members to CALL, and also work on the CALL website. Please get in touch with Todd or Joanne Kiley, PR committee chair if you are interested in joining the committee.

Meeting Sponsor

Vice president Clare Willis introduced and thanked the business meeting sponsor—S&P Global Market Intelligence, represented by Kevin Morrissey and Lindsey Cantazaro. Mr. Morrissey thanked the current clients in the room (a majority of the attendees). Since 2004, CapIQ has been working with law firms. They understand that budgets are tight but that the information they provide is hard to find. Speed is a priority, and CapIQ provides a means of collaborating with practice leaders, business development, and finding conflicts.

Meeting Speaker: William Birdthistle, Professor of Law at Chicago-Kent College of Law

Clare introduced Professor Birdthistle. He is currently a professor at Chicago-Kent College of Law, where he teaches on topics such as business organizations, securities regulation, corporate finance, investment funds, and international business transactions. Prior to Chicago-Kent he was an associate in the Boston office of Ropes & Gray, focusing his practice on mutual funds and hedge funds, specifically on governmental investigations into allegations of malfeasance in the mutual fund industry. In 2016, his book on 401(k)s, Empire of the Fund: The Way We Save Now, received critical acclaim from the academic world and by publications such as the New York Times, The Economist, Time, Money, and The Washington Post.

Professor Birdthistle began by expressing his excitement to be talking with a group of bona fide book lovers—the highlight of his speaking tour! He then spoke briefly about the cover of his
book (copies of the cover were provided at all tables). One of his children mistakenly thought that the shield was a Caldecott award and that he had won. To which he replied, “Why yes I did.”

He then moved on to his main topic, saving for retirement in America. There have been recent stories in the news of lawyers suing their law firms over their retirement plans. The topic of pensions has also been prominently featured due to the pension debt and obligations of Illinois state and local governments. Those with private pensions are a rarity today.

Social Security and employer retirement plans (previously more commonly operated as pensions) are the two biggest components of how we accumulate wealth for retirement. But the Social Security system is in jeopardy from politics and is not keeping pace with costs such as cost of living and healthcare cost increases.

The pension component is virtually extinct—especially for those working in the private sector. Only 3% of private sector employees have pensions. If you have a public pension, it’s questionable whether that money will be available when you retire, so we must handicap for the likelihood of both Social Security and pensions being at risk.

401(k) plans change the equation for employers. These are different than defined benefit plans, as companies are generally not fond of fixed commitments as it is hard to predict the future finances of the company.

But his book hypothesizes that the 401(k) experiment is not going to be successful. Over the course of the next 20-30 years, Americans will manage 16 trillion dollars of assets, but only 90 million Americans will do it well.

So, why is he so pessimistic? To start, the system’s success is predicated on us—everyday people. How we can understand how much we’ll need for our retirement and how to manage the money? These are difficult tasks with many unpredictable factors such as the volatile marketplace. It’s not a question of sophistication or what you know. It’s the structure of the system. Even if a group makes the same decisions, they’ll get different results because not everything is priced the same. Operating as an individual is always going to be more expensive—as opposed to group plans (think of bargain prices at wholesale clubs).

For example, investing in annuities is a gamble. You give $100,000, and they promise you a specific payout per month or year. They hope you die early, you hope you live long. This is basically an expensive pension.

The second reason for his pessimism is that fund managers make money no matter how the investment performs, which provides little incentive to spend time on finding an investment that performs well. You will only make money if the mutual fund gets bigger and increases in
value over time. So the fund managers focus their time and energy more on bringing in new investors, but not driving the value through investment choices. That conflict of interest is a core problem.

His third reason is the demonstrable problems in the financial/investment industry. Wells Fargo is a classic example in recent news. 5,000 people were fired, but probably not a lot of the people responsible for the decisions behind the alleged fraud in which millions of accounts were set up for individuals without their knowledge or permission.

The faith in mutual funds is also misplaced. It’s not just an easy and safe investment. When $16 trillion is involved, there are those that will find a way to benefit at the expense of others (i.e. fund managers taking advantage of the investors).

A standard investment rule is T+3, which means you should be able to get your money out within three days of the transaction. In 2014, TIAA-CREF settled a lawsuit with almost 60,000 college professors for holding on to funds for up to 10 weeks after a transaction. Professor Birdthistle was one of them! In those intervening weeks, TIAA-CREF was making money from him as an investor and denying him the opportunity to invest those funds through other transactions.

Professor Birdthistle acknowledged that the best advice is usually boring. Find the cheapest investments and don’t touch them. We tend to not think that “cheap” is a better investment because that concept doesn’t translate into our other experiences, such as the price of haircuts or, perhaps, tacos.

The professor stated that the fee you pay is the biggest drag on your investment.

The last chapter of the book focuses on how to fix the problem of saving and investing for retirement. If the claim is there is not enough money in the bucket when we retire, the usual proposal is to just pour more money into the bucket. One way of doing this is auto-enroll in investment accounts where the investor has to opt-out rather than opt-in. Another suggestion is auto-escalation that increases the deposits by 1% or 2% each year. Professor Birdthistle thinks those ideas are great but it’s also like saying the house is a little too cool in the summer, so let’s cut back on air conditioning, without considering other options such as keeping doors and windows open.

He advises licensing for investors who want to use anything but passive funds—not just fund managers. He also recommends that investors take a test for competency in the field. However, not surprisingly, there is a lot of push-back on this within the financial industry. Active funds rarely return greater results than passive funds, but the fees are still higher. Some in the industry have said that we shouldn’t bother with licensing the management of active funds, that we should just ban these types of funds altogether! The professor acknowledged that this
might be a bit extreme. Others in the industry have suggested pushing financial literacy. The real overarching issue is why anyone would care about other people’s savings (a libertarian argument). To answer that he thinks back to smoking—why should anyone care? There isn’t secondhand investing like secondhand smoking. But who’s paying the health bills? In turn, who is paying when older Americans don’t have the money to support themselves? The government and the rest of us (taxpayers) will be responsible to raise those funds unless we just callously choose to forget these people.

If the baby boomer retiring block wakes up and realizes this danger they’ll have to ask for a bailout, just like Wall Street in 2008. Then all American taxpayers will be on that financial hook.

Professor Birdthistle offered another radical suggestion—a good retirement plan for everyone. If you look at these lawsuits at universities or at companies like Boeing or John Deere, what they are often accused of is providing too many fund options. Those actions possibly violate ERISA laws that require a “prudent” group of funds which are whittled down responsibly. For every 20 new choices, participation goes down by 2 to 3%. Also, why are such expensive funds (by fees) included as options? Because companies like Fidelity make more money from those funds.

For those without retirement plans accessible through the workplace, the professor suggested thrift savings plans that are very inexpensive.

Lastly, the professor stated that the SEC needs to do their job and really watchdog the industry—especially for fund management fees. The wrong companies are being sued. They need to sue the smaller companies that are the really bad players and taking the most advantage of investors.

**CALL Member Questions**

*Are there any models for retirement investing/planning outside the U.S. that work really well?*

Chile. The government promises a floor—a base amount of support and 401(k) options for additional investments. This is feasible because Chile’s economy is much smaller than ours. Additionally, Americans have long life expectancies and healthcare in America is very expensive. Plus, our backup systems like the Pension Benefit Guaranty Corporation (PBGC) and Social Security are deep in debt. Australia is another successful example which requires savings—essentially a better run Social Security system.

*When will the Fed raise rates so that savings accounts once again make money?*

The Fed has chosen to encourage business investment which is costly to those living off interest income. Other nations’ governments are focusing more on the individuals rather than the larger economy.
If we manage our funds well, but another market-crashing event like Brexit happens, what should we do?

Wait it out—markets come back and our government is still the best investment on the planet. The professor admitted that this is hard advice to take. He recommends using target date funds (based on retirement date) to weather against the panic. However, there have been some problems with these funds. They are expensive and some have failed to move investments into less risky categories as the fund approached the target retirement date.

What are your thoughts on the new fiduciary rule for broker-dealers?

What impresses him the most is that if you are a broker-dealer you have to treat your client like you are a fiduciary, just like investment advisers are required to do. Before this rule was enacted, broker dealers just had to recommend “suitable trades” which has not been well defined. So they would recommend investments that paid them the best commission—regardless of the performance of the investment. What also surprised him was the outraged reaction of the broker-dealer industry. That industry is suing to have this rule undone. They’re claiming that this will be more expensive for everyone because they’ll have to get more training. He doesn’t buy that argument. But he only thinks this implementation of this rule will be successful if the SEC backs it up. Right now this is just a Department of Labor rule effecting ERISA only.

Committee Announcements

Robert Martin, Community Service

On behalf of himself and co-chair Julie Swanson, Robert thanked everyone for their contributions over the past year. The committee has big plans ahead for the 70th anniversary but asked for suggestions for community service recipients or projects. The September Business Meeting’s cash donations will go to the Rolfe Pancreatic Cancer Foundation, a Chicago-based organization. The November meeting donation recipients will be an organization supporting homeless veterans. February’s recipients will be Greater Chicago Food Depository. They are still looking for ideas for the May business meeting.

Julie Pabarja, Grants and Awards

Julie reminded the membership that CALL has money available for conferences and other educational opportunities. Please reach out to the committee if you have questions about applying or if you have suggestions for events or programs that might qualify for grants so that those can be shared with the membership. The grant application form can be found on the CALL website.
Joe Mitzenmacher, Government Relations

Joe reported on the presentation of the Legislator of the Year Award to Congressman Mike Quigley (Fifth Congressional District) for his work on open governance initiatives. Rep. Quigley is co-chair of the bi-partisan Congressional Transparency Caucus. That caucus has worked to make CRS reports more accessible to the public and to provide easier access to PACER and FOIA amendments. The award was presented at his office in August.

Door Prize Drawing

Todd and Clare thanked LexisNexis for providing the door prizes at today’s meeting. The winners were Susan Berg, Cheryl Kruger, and Anita Calderon.

Adjournment and Next Meeting

Todd adjourned the meeting and reminded the membership that the next business meeting will be held on November 17th at Rock Bottom Brewery.
If there is one constant in life, it is change. We change daily, starting with daily physiological changes (nails grow, hair grows, cells generate and die off) to personal changes (changes in relationships, changes in where we live) to changes that effect many people (political changes, economic changes). We also change professionally. We call these changes transitions. Dictionary.com defines transition as “movement, passage, or change from one position, state, stage, subject, concept, etc., to another; change.” This definition implies a discrete time of transition. The transition has a beginning, a middle, and an end as we move from an “as is” condition to a “to be” condition.

I would submit that we as professionals should be transitioning all the time. We should be taking our day-to-day experiences and using them to move us toward our next position, whatever that may be. I remember being told many years ago that one should start looking for one’s next job the day one starts a new job. There is truth and wisdom in this. Transitions are not something that we “do.” They are lived as part and parcel of the human experience.

When most people talk about professional transition, they usually talk about things like networking, résumé writing, and interviewing skills, all of which are important. What I want to talk about is being able to take experiences, some of which may be very old, and maybe not even related to librarianship, and weave them into a tapestry that we can carry throughout all our transitions, both large and small, both momentous and every day. I want to posit some questions, the answers to which can help define and guide our professional transitions. These questions are not meant to be comprehensive. They are the things that I have thought about during my own transitions.
Where do you find your fundamental identity as a librarian? I’ve always said that everything I learned about being a librarian, I learned while being the manager of my high school football team. You might think that incongruous because, back then, I was not even thinking about being a librarian. What my experience as the manager taught me was the importance of service in anything that one does. Having a service orientation can aid in transitions because it shows an attitude of cooperation and collaboration. Being the manager may not be the most glamorous job on a high school football team, but it is one of the necessary parts that makes for a winning team. Are you, by your service orientation, making yourself a necessary part of a winning team?

How have we come to see users of our services? This is an interesting subject to explore. There was an article in the October 2013 issue of *AALL Spectrum* titled “A Customer Is a Patron Is a Client but Not Really” by Carol Ottolenghi. The ability to name the people who use library services will, through that process, enable us as professionals to reevaluate our relationship to them. That is a significant transition. I have always used the term client because it presumes a collaborative, dynamic relationship. Also, since many of us are working in the law firm environment, the use of the term client reminds us that, just like the attorneys are hired to deliver value to their clients, we are also hired to deliver value to the attorneys who send their requests to us.

How have you used previous professional experience? I have direct personal experience with this. My current job relies heavily on the experience I gained as an instructor and course developer at Accenture. I do not think I would have gotten this job if I had not, on a regular basis, looked back at those experiences and asked myself how I could use those experiences in the task at hand.

What have we done with feedback, both positive and developmental? Everybody likes to be praised, and we easily internalize praise, but how do we handle it when the feedback given is developmental in nature? How do we internalize it and use it as a tool and a source of transition? Have we looked back on all the various types of feedback we have been given and critically asked ourselves, “How can I use some or all of this today to make myself a better employee, a better researcher, and, in the final analysis, a better person?”

How are we taking advantage of professional development opportunities? One of the things that I learned at my first AALL conference was to make every effort to attend a session that is outside my regular area of work or expertise. I would submit that looking at professional development in a broader sense to include opportunities to hear lectures or attend seminars on topics outside the areas of law or librarianship can act as catalysts for thinking about one’s own professional life differently. It is the ability to look at things differently that will create within a person an ethos of constant growth and transition. It is often a futile gesture to say, “I’m in transition now because I lost my job, so I should do some professional development to get ready for my next one.” The value of “fire alarm-induced professional development” is limited at best because it is done under duress.
How have we aided others in their transitions? It’s a well-worn adage that “what goes around, comes around.” We have all known people in various stages of transition. Sometimes these transitions are difficult, and sometimes they are not. Either way, I am absolutely convinced of the necessity to accompany people in their transitions. Our basic humanity and professionalism require us to help our colleagues in need, but it is also good because, through the journey and transition of another, we can learn things that will be of use as we move through our transitions. I know from personal experience the value of having people accompany me on my transitions, and I have gained immeasurable value from accompanying others on the journey.

Have you served as a mentor? Mentoring is a professional responsibility that we all have. Mentoring is an enriching experience, not only for the mentee, but for the mentor as well. Mentoring provides leadership skills that can be useful if one is planning to enter management at some time in the future. Mentoring also demonstrates care for the profession and an interest in its future development. A person you mentor today may well become tomorrow’s library director. By mentoring, you are helping transform and transition the profession for the future.

Transitions, whether professional or personal, are sometimes hard but are always complex; they require us to realign and refocus activities, areas of focus, and relationships. I am convinced that the more we consider transitions a natural part of our everyday lives, the better we will be able to cope with them when they come and increase the probability of a good outcome.
TAX DEDUCTIONS FOR LAW LIBRARIANS: THE GOOD, THE BAD, AND THE UGLY

DONNA M. TUKE

By their very nature, law librarians are intellectually curious. Of course, that’s a good thing as law librarians need to keep abreast of new developments in constantly changing areas of law and the technology that is used to deliver information.

There are opportunities for continuing education at the national, regional, and local levels. At the national level, AALL offers various institutes and webinars in addition to the Annual Meeting. There are from time to time regional law library meetings and conferences. The local chapters also offer meetings and programs that are extremely useful for local resources. But to what extent does the tax law allow for deductions in pursuing these opportunities?

This article first discusses what items can be deducted and then where and how they are deducted on your tax return. Additionally, expenses may be limited by other sections of the Internal Revenue Code. Finally, I will point you to some additional resources.

The Good: What Expenses Can Be Deducted

If your employer pays for all your continuing education and professional related expenses, read no further. It is always better to have reimbursement of these expenses as it is a dollar for
dollar reimbursement. But if that is not possible, you may take these expenses as a deduction. Note that deductions do not deliver a dollar for dollar benefit and can even be phased out as your income increases.

The following can be deducted:

- Registration fees, tuition, books
- Use of your car to travel to meetings and programs
- Transportation (airfare/train/taxis) to meetings and programs
- Meals (only 50%)

To qualify for a deduction, these expenses must be considered to be “ordinary and necessary” to the law librarian’s profession.

The above list is sometimes referred to as “Qualifying Work Related Education Expenses.” These are typically incurred for one of two reasons: the education is required by your employer or the law to keep your present salary, status, or job, OR the education maintains or improves skills needed in your present work. Law librarians are not generally required by law to maintain skills, unlike lawyers, so continuing education for us is to maintain our skills.

You can deduct tuition, books, supplies, lab fees, and similar items, along with certain transportation and travel costs. If you want to drill down on the details, see this section of IRS Publication 970. These expenses must have been incurred and paid for during the year, and must have been “necessary and ordinary” for carrying on our business or trade.

Another category of expenses are “miscellaneous expenses.” Examples of this type of expense include our dues paid to AALL, special interest sections, and our chapter, CALL.

How and where to deduct these expenses

Up to now, you are probably getting pretty excited about the possibility of getting some nice tax deductions, right? But as with most things in life, the IRS giveth and the IRS taketh away!

In order to benefit from these deductions, you first must be a taxpayer who itemizes, that is, one who uses a Form 1040 Schedule A. If you own a home, have a mortgage, and pay real estate taxes, you probably already use Schedule A. Generally, you first report unreimbursed expenses on IRS Form 2106 or IRS Form 2106-EZ and attach it to Form 1040. Deductible expenses are then reported on Form 1040 Schedule A as a miscellaneous itemized deduction subject to a rule that limits your employee business expenses deduction to the amount that exceeds 2% of your adjusted gross income (AGI).
The Bad: What does 2% of AGI mean?

For example, your gross income might be $100,000 a year while your AGI is $75,000 a year due to various adjustments on page 1 of Form 1040. $75,000 will be the number at the bottom of your Form 1040 (line 37) and at the top of page 2 of your Form 1040 (line 38). (For purposes of this article I’m only going to refer to the IRS Form 1040.)

Two percent (2%) of $75,000 is $1,500. Your expenses in this category that are above $1,500 are deductible on your Schedule A.

Let me break this down: let’s assume that you traveled from Los Angeles to the AALL Annual Meeting in Chicago.

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration for Annual Meeting</td>
<td>$600</td>
</tr>
<tr>
<td>Hotel and airfare</td>
<td>$400</td>
</tr>
<tr>
<td>Meals @ 50%</td>
<td>$100</td>
</tr>
</tbody>
</table>

In the same tax year, you also have the following additional expenses for which your employer did not pay:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>AALL dues</td>
<td>$400</td>
</tr>
<tr>
<td>Special Interest Sections (3 @ $20)</td>
<td>$60</td>
</tr>
<tr>
<td>CALL dues</td>
<td>$35</td>
</tr>
<tr>
<td>CALL lunch meetings (4 @ $25)</td>
<td>$100</td>
</tr>
<tr>
<td>Transportation to CALL meetings via taxi</td>
<td>$40</td>
</tr>
</tbody>
</table>
All of these expenses are reportable on Form 2106 (see below or click here). The number on line 10 of Form 2106 flows over to "Job Expenses and Certain Miscellaneous Deductions" on Schedule A line 21 (see below or click here). You can see there how the total amount of your deductible professional expenses gets reduced to $185.00 on line 27!
But wait! I don’t have a Schedule A: the good (again).

Most law librarians are employees of an institution or law firm. But if you are an independent law librarian, you could claim all of the above on IRS Form 1040 Schedule C. I am not going to go through an example of that in this article. But in that case all of the above would be business expenses that are not subject to the 2% AGI rule.

If you do not file a Schedule A or a Schedule C, there is still an opportunity to claim some education benefits for qualified courses taken to improve your skills through the **Lifetime Learning Credit**. The course must be offered by a qualified institution. Programs and meetings offered by AALL or CALL do not qualify.

On the other hand, if you took a course on international bibliography from Harvard, for example, that may qualify. These credits are limited by your income. The amount of the lifetime learning credit is 20% of the first $10,000 of qualified education expenses you paid. The maximum amount of lifetime learning credit you can claim for 2016 is $2,000 (20% × $10,000). However, that amount may be reduced based on your Modified Adjusted Gross Income (MAGI). More on this credit is found in **IRS Publication 970**. The good news here is that the MAGI is fairly high, so even if you get phased out of the unreimbursed business expenses, you may still be able to get this credit, or a part of it. **IRS Pub. 970** has all the details.

**The Ugly: The Alternative Minimum Tax (AMT)**

You’ve heard of the AMT, right? This alternative tax system is designed to make sure that you always pay some taxes if your income is above a certain threshold. So at the end of the day, you might qualify for a deduction for activities that keep you current, but the AMT may take them away.

**Finally**

Always keep good records! Should you be audited, you will want to produce your receipts or the deduction will be disallowed. I would also keep a copy of the program’s agenda. This would back up you claim that the topics discussed were necessary to keep your knowledge current. Make a copy of and store other receipts that might fade.

As always, you should consult your tax professional. Everyone’s tax situation is unique. This article is for educational purposes and does not constitute tax or legal advice.

As we face the uncertainty of what the new administration might change on tax laws, it is doubly important to stay current on tax legislation!
For those who would prefer to read the original tax code provisions on the above, a good source is the Legal Information Institute’s website. Enter a phrase, such as “miscellaneous deductions,” to retrieve the Code Sections and read: https://www.law.cornell.edu/uscode/text/26/67. To read the regulations pertaining to the same code section, click on the Tab: Authorities (CFR).

Free IRS Resources

The following free IRS resources may be helpful. Your tax dollars at work. But note that even though these materials are written by IRS employees, they are not primary resources.

- IRS Tax Map is a good place to start. Enter key words in the search box such as “work related deductible expenses” or “work related education expenses” and obtain a list of IRS reference materials.
- Tax Topic 513: Work-Related Education Expenses
- Tax Topic 508: Miscellaneous Expenses
- IRS Publication 17, Your Federal Income Tax For Individuals
- IRS Publication 463, Travel, Entertainment, Gift, and Car Expenses (see Chapter 5 on recordkeeping)
- IRS Publication 529, Miscellaneous Deductions
- IRS Publication 583, Starting a Business and Keeping Records
- IRS Publication 970, Tax Benefits for Education
- IRS Tax Benefits for Education: Information Center

Donna M. Tuke, MLS, JD, EA, has worked both in law libraries and tax firms. She was the founder and publisher of the Legal Information Alert and Business Information Alert (now archived in HeinOnline). She became an Enrolled Agent (see below) as a second act after raising a family but is still active in law libraries. She is the Executive Director of the Illinois Society of Enrolled Agents (ILSEA) and the manager of the Evanston tax site for the Center for Economic Progress (CEP). Donna also consults and is available for temporary library assignments, but not during tax season!

Selecting the Right Tax Professional

Be careful when selecting a company or individual to prepare your tax returns. Choose a certified public accountant, an enrolled agent, or a licensed income tax preparer.

Here’s some advice from Chicago’s Department of Business Affairs and Consumer Protection to consider before you hire a tax professional:
• Check the preparer’s history with the Better Business Bureau.
• Be sure they can prepare your return by the tax deadline.
• For 2017 the deadline for Form 1040 is April 17. No word yet if Illinois will follow the Federal tax deadline.

To find an enrolled agent you can go to this site.

Any tax preparer who is paid for doing returns must have a preparer tax identification number (PTIN) which is included on the return. The IRS has a website listing preparers who hold professional credentials recognized by the IRS.
COOL TOOLS CAFE AALL 2016

DEBBIE GINSBERG

Cool Tools Café is always one of my favorite events at AALL. I enjoy giving demos as well as learning about new tools. Here, I’ll recap the tools I presented–Perma.cc and Page Vault, web page archiving tools that law schools, firms, and other legal organizations might find useful. I’ll also share a bit about some of the other interesting tools presented. To see handouts from other tools at the cafe, check out the CS-SIS website.

Debbie Ginsberg – Permanent Links with Perma.cc and Page Vault

Link Rot

Link rot occurs when scholars and other writers link to articles and other web resources that are later moved to another URL or removed altogether (see: In Supreme Court Opinions, Web Links to Nowhere). In a typical example, a footnote in Justice Alito’s concurrence cites “http://ssnat.com”—but that website no longer exists in the form that was cited (click the link to learn more).

What is Perma.cc?

Perma.cc is a free tool from Harvard that prevents link rot. Scholars, librarians, and journal editors use Perma.cc to create permanent links to permanent archives. If material is later altered, moved, or removed, the Perma.cc link will allow users to read the original material.
Perma.cc links are short and are identified by a unique number, e.g. 
https://perma.cc/0Hg62eLdZ3T. The link goes to a page showing an archival view of the site. A screenshot view is also available, along with a link to the live site. In this example created by the Supreme Court of Michigan, it’s a good thing that the site was preserved because the live site no longer matches the archived site: https://perma.cc/Z992-2ZMQ.

Perma.cc is useful for preserving access to news articles, blogs, web pages, and PDFs.

Note, however, Perma.cc can’t save everything on a website (like databases or videos). Also, some news sites do not allow the material saved in Perma.cc to be made available to the public (it is available to the person who saved it).

There’s a lot more that Perma.cc can do, so check out my handout and further information on the Perma.cc website.

Page Vault – Archiving for Law Firms

Law firms may not be as concerned with link rot, but they need tools to reliably preserve the chain of custody for websites used as evidence during trial. Page Vault and similar software can assist with this process. Page Vault can preserve similar materials as Perma.cc (e.g. webpages but not databases) as well as metadata about what was saved and when. Page Vault takes a screenshot of the site that cannot be altered. This allows the site to be shared with others and used as evidence in court.

Jesse Bowman – Neota Logic

Need an automated form for your website, but don’t have time to create it by hand? Or maybe you’re looking for something that can describe a complex process but want to focus on the content, not the coding? Consider using an “expert system” platform like Neota–software designed to create complex question and answer (or branching) sites with just a few clicks.

Jessie describes Neota as “an expert systems platform used by law firms, general counsel, legal information publishers, nonprofits, and, increasingly, as part of experiential law school courses.” He further notes:

The platform requires no knowledge of coding and allows users to develop tools that provide automated legal analysis, client intake, and document creation. At the heart of applications created using Neota Logic is an in-depth understanding of the law governing a particular situation, making the tool relevant for law librarians in all types of organizations.
Becka Rich – Elucidat

Becka notes that “Elucidat is e-learning software designed to make the creation of online training materials easier, faster, and higher quality.” It can be used to add interactive activities to online and face-to-face learning. In her demo, Becka gave a tour of this easy-to-use software, showing us how to create websites, quizzes, and more in a matter of minutes. Unfortunately, while free trials are available, Elucidat is quite expensive for the academic market ($7500 for 2 authors/year), particularly when many of us already have access to similar (albeit not as intuitive) platforms.

Handout

Pablo Arredondo – Case Analysis Research Assistant (CARA) from Casetext

According to Pablo:

CARA is a new brief-driven case discovery tool developed at Casetext that supplements traditional keyword query research tools by enabling an attorney to upload entire documents (e.g. briefs) as queries. The tool takes a brief as input and outputs a list of relevant decisions that are not cited in the brief itself. It does this through data-mining the brief and using the extracted information (citations, key terms, etc.) as a sort of ‘query’ to a case database.

The tool is very intuitive—in my tests, it only took a minute to upload a sample brief. Shortly after, CARA presented me with a list of cases–some of which had been cited in the sample, but CARA provided additional information about those cases (such as subsequent citations). You can quickly limit the results by jurisdiction–federal or state. I would still use Lexis and Westlaw for much of my research, but I could see using CARA to do a final check to make sure I found everything that was relevant.

Handout
AALL Annual Meeting in the Windy City Doesn’t Disappoint

HEIDI KUEHL

I always look forward to the AALL Annual Meeting and informal gatherings each year because of the variety of activities, opportunities to connect with dear colleagues and friends from around the country/globe, and informative educational sessions. The meeting is also filled with business meetings of special interest sections, committees, and task forces, which provides an opportunity to serve our association in myriad ways. I was grateful for the CALL grant this year which facilitated my attendance and participation in the Annual Meeting programs and Special Interest Section meetings and allowed me to share ideas with other law librarians and law library directors.

I contributed to two programs at this year’s annual meeting and also volunteered at the hospitality booth and registration desk. This was a wonderful way to involve myself with the educational programming while also meeting new people as a local volunteer. The receptions, such as the ALL-SIS reception at Loyola, also didn’t disappoint. That reception was a great way to celebrate the successes of our very active AALL ALL-SIS members this year and recognize those who have done wonderful things for law librarian scholarship and service.

Although I generally learn a lot from the various program tracks at AALL, I especially enjoyed Improv(ing) Library Communication and Teamwork with Applied Improvisation. At the session, fellow CALL member and law library director, Patricia Scott, and I learned what it is like to be improv partners and step outside of our conference comfort zones. We had to rely on our gestures and reactive facial expressions to intuit understanding and follow the improv director’s
lead. It was challenging to step outside of our normal activities as law librarians and socially acceptable professional nonverbal cues, execute gestures that aren’t within our normal bailiwick, and then react and pivot as we responded to each other’s gesturing. It was a master class in being flexible and creative, and it could also be described as perhaps teaching more mindfulness of the full range of human emotions, expressive capabilities, and further expressive cues that we can bring to meetings as colleagues. I came away from the improv session (which, let’s be honest, had its share of laughing and disbelief while responding to the improv director’s cues!) with one important lesson about the tone of responses. One of the breakout exercises was to have one person say “Yes, and…” versus responding to someone who says “No, but…..” Inevitably, the person that is saying “Yes, and…” is viewed with a more positive and productive tone than someone who is always saying “No, but…” or “No, and…this is why that won’t work.” This was something that we could bring back to our home organizations and practice. Well, that and that improv retreats could likely do a lot of good as a playful and fun exercise of stretching of the mind in a creative way (which lawyers/law librarians often don’t do).

I also enjoyed the Negotiating with Confidence session by my Northern Illinois University colleague, Professor Alan Boudreau, which I moderated for the conference. Professor Boudreau identified the importance of research and planning for successful negotiation outcomes. He also described the “Best Alternative to a Negotiated Agreement” (BATNA) method. Before breaking out into groups to let participants chat about applying BATNA to law library negotiations, he also explained how important it is to understand the other side’s needs and interests and to brainstorm possible outcomes based on your organization’s interests versus the other side’s needs and interests. Through this, you can better anticipate the plausible outcome(s) of the negotiation and glean incentives for the other parties involved. Overall, it is vital to gather information, research, and plan effectively for negotiation meetings to achieve success and come to the negotiating table with all information gaps addressed and critical questions answered.

The Chicago conference was a memorable one. It was in a familiar and favorite home city of mine. It also provided a plethora of ways to connect with colleagues to learn new professional skills through informal and formal conversations facilitated and impeccably planned by the AALL Annual Meeting Programming and the Local Arrangements Committee with CALL members’ active participation.
A FIRST TIMER’S AALL GRANTEE REPORT

MATTHEW TIMKO

At the time of the AALL conference in July, I was about two weeks from finally becoming a bona fide librarian, and I was excited to see what a national conference in my chosen profession would look like. My experiences with CALL have been wonderful, specifically because the CALL community is so close knit and collaborative, and I wondered whether the national conference would be the inverse since the geographic regions represented were so vast. I quickly found my concerns could not have been less warranted. I met librarians from Tennessee, Massachusetts, Hawaii, California, Florida, and elsewhere, and I was struck by how similar my interactions with them were to those with Chicago librarians. This was tremendously encouraging: as a new librarian, I am very happy to have chosen a field where there are so many supportive and friendly colleagues, not just locally, but nationally. This was my biggest, and most relieving, takeaway from the conference.

Beyond my realization, there were three specific elements of the four day conference which I will never forget. The first was the sheer convenience of the location: having never been to an AALL conference, I didn’t fully appreciate (until the third day) how wonderful it was that my first one would be in the city I work in every day. Staying in the hotel with my wife and 1 ½ year old son, there was no question about how we would get there, where we would eat, and what we would do in the city, because the answers to those questions were so obvious to me. It dawned on me that this experience would be far more stressful in a city where I had no previous interactions, and that I was incredibly lucky that my first conference was in Chicago. I will never truly know for sure, but I believe that being “home” helped make the conference less stressful and far more enjoyable.
Second, and unfortunately a criticism, I groaned at the scheduling of presentations when I saw the schedule. As I went through the schedule and began identifying what events I wanted to attend, I was pleased to find that there were many presentations on legal analytics, data processing, and legal technologies, all three topics of interest to me. As I began to plan my days based on which presentations I would like to attend hour by hour, I began to realize a pattern that was none too welcomed. Of the five presentations I had highlighted as “must see,” four of them were on Tuesday morning! This was a huge bummer since I would have liked to attend each presentation in person. However, even this has a silver lining as the conference provided video recordings of all the presentations, and I could see everything I wanted in the weeks following. While I would have preferred a more staggered schedule based on topic, I understand that scheduling these many things in such a short period is no easy task, and I am so appreciative that I had the option to go back and watch the presentations.

The last, which was far more comical (only because of the outcome), occurred on the second day. I came down to the conference early to (1) get settled and (2) finish up some of my library school assignments so that I could focus on the conference. Specifically, I wanted to see the keynote address at 9:00 am. I went to get coffee and a bagel and found a quiet spot. At around 8:45 I began to pack up and realized to my horror that I could not find my wallet! I retraced my steps, checked in with the security desk at the hotel, the registration desk and the staff offices. None of them had it, and I couldn’t find it as I kept looking for the next 45 minutes. Needless to say, I missed the address. As panic turned into acceptance, many people whom I told were very helpful, offering me cash, offering to buy me lunch, or any other acts of kindness; more impressively, about half of these offers were from people I had met only the day before. I was finally able to find my wallet, but those hours of bewilderment were softened by the gracious and friendly librarians associated with AALL.

I am so grateful to have received the CALL grant to attend the conference and to have had the opportunity to learn so much and meet so many wonderful librarians. On the last day of the conference, I was already looking forward to the 2017 conference in Austin. Beyond the knowledge and experiences that I obtained, the conference reaffirmed for me that I had indeed found the career I wanted and colleagues I wanted to be around.
MANDATORY E-FILING

JUANITA HARRELL

Mandatory e-filing began in DuPage County on January 1st of this year. Mandatory e-filing is required for all civil cases. DuPage County is the first county, and so far the only county, in the state to require mandatory e-filing for all civil matters. In order to accommodate patrons and attorneys who do not have scanning capabilities, the courthouse has four e-filing stations in the clerk’s office: one in the law library and one in the attorney resource center. This e-filing process has been a learning experience for all involved. The library staff, clerk’s office staff, and judges’ secretaries have all had basic training on e-filing. The questions we get the most from patrons and attorneys are: “Is it really mandatory?” and “Do I really have to e-file?” The answer is yes. For some of our tech savvy patrons and attorneys this was great. It meant they only had to actually come into the courthouse if they had to. For our not so tech savvy patrons and attorneys, it has been and continues to be a learning experience.

The program allows a person filing a case to browse and attach documents to the appropriate case. If patrons or attorneys have access to a computer and know how to save documents to the desktop they are able to e-file easily from home or their office. If patrons fill out paper forms and then want to upload them we run into the problem of them not having access to a scanner unless they come to the courthouse or go to their local public library. So far, so good. Our regulars are used to the process and have become accustomed to e-filing everything. The attorneys that only have to file in DuPage County occasionally are still adapting.

In December of 2015, before e-filing was mandatory, we had a 39% e-filing rate. At the end of January of 2016, we had achieved a 76% e-filing rate. As of September 2016, we have a 96% e-filing rate. We will never be at a 100% rate due to the filing of wills and inmate letters.
The biggest lesson after almost a year of mandatory e-filing is that we all, patrons, librarians, clerk’s office staff, etc. must continue to practice patience.
TECHNOLOGIES GONE BY...NOT REALLY

THERESE CLARK ARADO

It has been over five years since I took a retrospective look at the technologies covered in the TechBuzz so I thought it was a good time to see what has stood the test of time and what has disappeared or been replaced by something different. To my surprise more has stayed with us than I would have anticipated given the ever changing landscape of technology.

The USB drive. In 2007 Debbie Ginsberg shared a piece on the USB drive, jump drive, thumb drive, insert-your-favorite-name-here drive and how its use changed our lives. The little device replaced all those 5 ½ and 3 ¼ inch disks and put them in a handy, single, portable location. While the floppy disks are mostly gone (I still have a box of these disks in storage), the jump drive is still going strong. There is a lot of movement to cloud storage but that has not replaced the jump drive for portability of more sensitive items and as a back-up. A quick search of the internet will reveal a number of articles on security issues with cloud storage. Additionally, while the CD may not be in favor for music anymore, anecdotally I have been told by a few IT professionals that it is still a stable storage system in favor in many areas for long term maintenance of materials.

Faceted searching in library catalogs. The spring 2008 CALL Bulletin brought us a column by Patricia Sayre-McCoy discussing a “new’ type of catalog for searching.” This “new” searching is the faceted search. Faceted searching is still very much a part of our lives in many ways, not just the library catalog. While still not able to discern the nuances between meanings of certain in terms (e.g. security – the financial document as opposed to a safety issue), faceted searching does provide additional avenues for researchers in locating otherwise undiscovered material.
Social networking. Hmmmm…… I was not sure if this existed anymore, but my colleagues on Facebook, Twitter, Snapchat, Instagram, etc. assure me it is still a significant part of our world. What has gone by the wayside are Law Libraries and Librarians on Ning. It was the start of a communication shift but did not stand the test of time. Other social media formats have become prevalent, as a perusal of any law library website will show. Additionally, the AALL Communities area has provided a means for focused topical conversations among law librarians.

Another topic addressed near its infancy that has stood the test of time is the **e-reader and the e-book.** We have seen shifts in types of devices and formats of delivery, but overall both are still going strong. The Kindle is still widely marketed, but tablets of all shapes and sizes are used now as e-readers. Public libraries have significantly expanded their e-book offerings and legal publishers have entered the market. LexisNexis Digital has brought a number of titles to law library users in the e-book, rather than a database, format. E-books, while still not the same as paper, at least bring some of the functionality of a print book back into use while adding a few nice features such as source linking, dictionary linking, and searching features that exist in databases but do not maintain the book experience. Interestingly, according to *Library Journal*’s “Ebook Usage in Academic Libraries 2016,” a survey of over 340 academic libraries revealed a leveling off of e-book demand since 2012.\(^1\) Reference titles were sought out in electronic format more frequently than other resources and textbooks were still heavily preferred in print.\(^2\)

The **QR Code** still exists, but it is not seen and discussed as frequently with respect to libraries as it had been several years ago. A few examples of interesting uses of QR codes in libraries exists but overall the use has been minimal.\(^3\)

While somewhat surprised that most of these items have stood the test of time, it is comforting to know that not everything has to change constantly. Also apparent is the fact that librarians are often able to identify the technologies that will benefit our work and our institutions and that will have long term use. I hope in five or so years that if I look back at what TechBuzz has covered in the interim that we will see a similar identification of bellwether technologies identified and implemented by the library communities.

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\(^1\) *Ebook Usage in Academic Libraries*, 2016 at 8.

\(^2\) Id.

CALL AWARDS SENATOR MIKE QUIGLEY LEGISLATOR OF THE YEAR

PHILIP JOHNSON

In August, CALL leadership visited the offices of Representative Mike Quigley to award him Legislator of the Year on the basis of his “outstanding leadership and commitment to open access to government information.” Rep. Quigley has represented the 5th Congressional District of Illinois since August, 2009 and is well known for his commitment to open government.

Rep. Quigley is co-chair of the House Transparency Caucus, the stated goal of which is to make government information more freely available and to make it easier for citizens to participate in the lawmaking process. He introduced the Equal Access to CRS Reports bill and has helped develop EveryCRSReport.com. He is also a co-sponsor of the Email Privacy Act. Further, as a member of the House Appropriations on Financial Services and General Government Subcommittee, Rep. Quigley has taken on the onerous task of pressing the Administrative Office of the United States Courts to improve access to court documents through PACER.
Nominees for CALL Executive Board 2017-2018

Margaret Schilt

The election for officers and directors for CALL’s 2017-2018 year will be held from February 15 to March 15. More information will come to your email closer to the election date. In the meantime, pictures and statements of the candidates may be found here (login required). Additional nominations may be submitted in accordance with Article IX, Section 3 of Association Bylaws by January 1, 2017.

Margaret Schilt, Chair
Nominations & Elections Committee
CALL 2016-2017 CHAPTER AWARDS

LYONETTE LOUIS-JACQUES

The Chicago Association of Law Libraries (CALL) grants the following awards each year in recognition of its members’ achievements:

- **The Agnes and Harvey Reid Award for Outstanding Contribution to Law Librarianship** *(established in 1982)* – presented annually at the May business meeting for outstanding service to the chapter during the previous year or for contribution to law librarianship.

- **Outstanding Lifetime Achievement in Law Librarianship Award** *(established in 1993)* – presented annually at the May business meeting for outstanding lifetime achievement in law librarianship.

- **Outstanding In-House Publication Award** *(established in 1993)* – given to an individual or group who created in-house library materials (print or online) that are user and staff oriented, are relevant for law libraries, and are outstanding in quality.

Nominations

Please consider nominating a CALL colleague for one of these three awards. You can review the awards selection criteria, a list of past award winners, and the nomination form at CALL Grants & Chapter Awards Committee page. The deadline for nominations will be in March, 2017. Please contact the Chapter Awards Committee Chair, Julie Pabarja, at Julie.Pabarja@lw.com, if you have questions or for more information.
COMMITTEE NEWS: GRANTS & AWARDS

Julie M. Pabarja

Trezlen Drake Awarded a Grant

Congratulations to Trezlen Drake for receiving a grant to attend the Association of College and Research Libraries Conference. We look forward to hearing about the latest developments and innovative ways to teach law students and lawyers.

Upcoming Education Opportunities

- **2017 AALL Management Institute** – AALL members are invited to attend this professional development opportunity to heighten their ability to manage with confidence and strategic intent. It will be held March 30 – April 1, 2017 in Chicago. Register by Friday, February 3.
- **Association of American Law Schools Annual Meeting** – This conference will be held January 3 - 7, 2017, in San Francisco. The theme, *Why Law Matters*, provides a forum for novel thinking and fresh perspectives on the role of law in society and the academy’s role in advancing respect for and understanding of the rule of law.
- **10th Annual Library Technology Conference** – This conference provides an opportunity for library professionals to come together to discuss the changing technologies that are affecting how users interact with libraries and to see how libraries are using technology to create new and better ways to manage their resources. It will be held March 15-17, 2017 in St. Paul, Minnesota.

Grant Money is Available

CALL is committed to supporting the continuing education needs of its members. There is grant money available to help financially support members to attend professional development programs. Any CALL member that has not received a grant since 2013 is eligible to apply for one. The grant application is available on the CALL website.

Nominations for CALL Award

The committee will soon be asking for nominations for the following CALL awards:

- The Agnes and Harvey Reid Award for Outstanding Contribution to Law Librarianship – presented to a CALL member for outstanding service to the chapter or for contribution to law librarianship
• Outstanding Lifetime Achievement in Law Librarianship Award – presented to a CALL member for outstanding lifetime achievement in law librarianship
• Outstanding In-House Publication Award – presented to an individual or group who created in-house library materials (print or online) that are user and staff oriented, relevant for law libraries, and outstanding in quality
2017 CALL MEETING SCHEDULE

Business Meetings

Business Meetings and Educational Events Policies

2017
- February 16, 2017 (Thursday)
- May 11, 2017 (Thursday)

CALL would like to thank all of the speakers and meeting sponsors at this year’s business meetings.

Executive Board Meetings

For 2017, the Board will meet the second Tuesday of every month. Specific dates are:

- Tues., Jan. 10, 2017
- Tues., Feb. 14, 2017
- Tues., Mar. 14, 2017
- Tues., April 11, 2017
- Tues., May 9, 2017
CALL Bulletin Information

The CALL Bulletin, the official publication of the Chicago Association of Law Libraries (CALL), is published four times a year and is provided to active members as a benefit of membership. CALL does not assume any responsibility for the statements advanced by the contributors to the CALL Bulletin, nor do the views expressed in the CALL Bulletin necessarily represent the views of CALL or its members.

Contributions to the CALL Bulletin are always welcome. Please be advised that contributions submitted for publication are subject to editorial review. The Bulletin editors have the discretion to decline to publish articles. Direct questions, articles, or other items of interest to the co-editors:

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