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From the President

*By Alina Kelly
 Director of Research and Library Services
 Mitchell Silberberg & Knupp LLP*

The academic school year is back in session and for those of us non-academics, people are coming back from vacations ready to send research requests our way!

I hope all of SCALL could enjoy the AALL Annual Meeting in Portland and to attend the Pacific Chapters Joint Reception, graciously hosted by our friends at CEB (thank you CEB!). It was a beautiful event, and it was wonderful to spend time with SCALL colleagues in a relaxed environment.

I would like to welcome the new board members, Sherry Leysen joining as Vice President, Michelle Gorospe moving to Treasurer from Member at Large, and Cara Henley Johnson joining as Member at Large. Thank you to Elyse Meyers, Julianne Odin, and Tanya Livshits for continuing their work on the Board. A big thank you to members rolling off the Board, thanks to Joy Shoemaker for being such an excellent Immediate Past President and to Sangeeta Pal for doing all the typically unseen, difficult work as Treasurer. Those will be some big shoes to fill!

Congratulations to the winner of the 2025 Rohan award, Caitlin Hunter! Our vendor service award winner for 2025 is Jenny Lillge, which is no surprise. Congratulations to you both.

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SCALL is well on its way to planning yet another year filled with plenty of educational and networking opportunities for our members.

Our programs committee is making headway on planning our Fall Program on networking on October 16th and our new Vice President is already well on her way to planning our 2026 SCALL Institute. Sherry is in the middle of proposals and has started the Speakers Committee. I am so looking forward to the 2026 Institute!

For this year, I would like to focus on continuing the wonderful work of our previous year's Board, who identified

and started to solve some budgeting issues for SCALL. We, as an organization, have specific programs we believe strongly in, and would like to continue to support those programs with our budget dollars.



To do so, we must continue to be judicious about our spending, and explore how to increase our revenue. This will keep us on an even keel moving forward, and hopefully will allow us to expand our budget back to typical giving amounts for scholarships and internships. Thank you to the Board, the Budget and Finance Committee, and especially Caitlin Hunter, for getting us back on our feet!

I am confident that going forward the financial future will be brighter for SCALL due to the hard work of the Budget and Finance Committee and the Board.

I hope to see you all at our Fall Program in October and look forward to seeing you at more SCALL events!

From Animals to AI, Librarians Call for Policy

*By Eric J. H. Chapman
Assistant Pasadena Branch Librarian
U.S. Court of Appeals, Ninth Circuit Library*

Many sessions at this year's American Association of Law Libraries' (AALL) annual conference called for libraries to adopt new policies to protect not only themselves, but librarians and their patrons. The justifications of some speakers' make their calls worth considering. However, other calls would be better addressed not in policy, but education.

Like the Code of Federal Regulations, too many policies can lead to conflation, contradiction, ambiguity, and micromanagement. Libraries are already inundated with policies and experiencing a slew of new ones to address political and legislative priorities. Moreover, while policies can help interpret the law, lay out procedures and expectations, and provide guidance for internal operations, they should not merely restate or direct people to follow existing law or other requirements. When the issue is employees' lack of knowledge, the answer to the issue is training, not policy.

Two sessions from this year's AALL conference that called for new policies help put this into context. The first advocated for the policies to address the integration of generative arti-



***Wondering if Eric can bring his llama buddy into the library? Read the article and find out!
(Photo courtesy of Eric J. H. Chapman)***

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cial intelligence (generative AI). The second advocated for policies to address a more adorable intelligence: service dogs.

Given that headlines regularly appear in the news about someone in trouble because of an AI fumble, calls for policies to address generative AI are unsurprising. At various points in their discussion, the panelists of *Generative AI Considerations in Licensing Agreements* referred to the importance of internal policies. As often done, this was addressed in the context of attorneys lacking competency and knowledge of the risks associated with generative AI. On another occasion, a speaker noted her firm adopted policies addressing requirements for what constitutes appropriate use of generative AI and how attorneys should communicate with clients and stakeholders about generative AI. She noted that to reinforce these policies, they are at the forefront of all trainings and discussions on generative AI.

Advising employees how to communicate with clients about generative AI is a reasonable policy, setting forth a purely internal standard for company culture and continuity. However, policies to address concerns of confidentiality and privacy will often have limited value. Attorneys, judges, and other support staff already have pre-existing legal and ethical obligations to protect client confidentiality and other case information. Attorneys also have an obligation to “keep abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology.” Model Rules of Pro. Conduct r. 1.1 cmt. 8 (A.B.A. 2025). Prudent would be a policy which requires an employee to complete training before obtaining access to any generative AI tools—as some employers do. But a policy to follow existing law and policy begs for confusion.

Regarding the more adorable side of intelligence, the panelists in *Animal Policies in Libraries: Balancing Accessibility,*

Safety, and Inclusion advocated for libraries to adopt policies regarding service animals and their handlers. As stated by coordinator and speaker Savannah Long, service dogs are like oxygen tanks. Just as a librarian would not prohibit a patron from visiting the library with an oxygen tank, they likewise should not prohibit a patron from visiting with a service dog. It is the law. Undisputed is that most librarians are unaware of the legal restrictions on what they can ask patrons regarding purported service animals. As conveyed, they can ask only two questions: (1) Is this a service animal required because of a disability? (2) What work, or tasks has the animal been trained to perform?

Although the legal profession seldom addresses the Americans with Disabilities Act, unlike the laws governing confidentiality, which it does daily, any policy merely restating the law risks leading to confusion and inconsistent practice, especially as laws change. However, what was compelling in the session was the potential value for policies interpreting the law and addressing internal procedures on how to manage disobedient animals, emotional support animals, and disruptive behavior.

Before enacting new policies, libraries should consider the root of the issues to be addressed. New policies on issues already addressed risk confusing the underlying situation. It is the obligation of every librarian to abide by the Americans with Disabilities Act and relevant privacy laws. It is further the obligation of every attorney and their support staff to follow their respective rules of professional conduct and related laws. Is a policy not to disclose client information on AI platforms serving further purpose than pre-existing obligations? Rather than conflating confidentiality issues, might a single policy on confidentiality and mandatory training and directions be sufficient? In navigating these turbulent times, libraries should use the opportunity to assess and evaluate their policies and seek to directly address the root of the problems at hand. The real issue is often not a lack of policy, but a lack of knowledge and education.



SAVE THE DATE

SCALL FALL PROGRAM 2025

Date: Thursday, October 16, 2025
Time: 12-1pm
Location: Zoom
Description: Join the SCALL Programs Committee for an informal discussion on networking. Come share experiences, gather new ideas, and connect with other SCALL members! More details to come, contact Julianne Odin (jodin@sandiego.edu) with any questions.

Selector School Next Gen: Building and Curating Your Library's Future Collection (AALL 2025)

By Miguel Guzman (he/him)
Librarian, Collection Development
LA Law Library

Are physical materials on the way out? What does creative budgeting really look like? And how are librarians rebranding their collections to stay relevant in a digital-first world? These were just a few of the future-focused questions explored during the session "Selector School Next Gen: Building and Curating Your Library's Future Collection" at this year's AALL Annual Meeting.

Panelists Elisabeth Umpleby (University of Connecticut), Wende E. Moore (University of Georgia School of Law, Alex-

ander Campbell King Law Library), and Allison C. Reeve Davis (Littler Mendelson P.C.)—led by program coordinator Jennifer Mart-Rice (University of Alabama School of Law)—shared practical insights into the evolving landscape of collection development, resource allocation, and user engagement.

The panel opened by addressing the continued wide-ranging implications of the American Bar Association's recent revisions to accreditation standards, which no longer mandate the maintenance of a physical law library collection. The panelists mentioned that while this shift offers more philosophical freedom in acquisitions, it also places greater responsibility on selectors to justify collection decisions—particularly absent having the "ABA in our corner," as Moore noted. The panel posited that the lack of enforced standards, combined with shrinking budgets, could prompt law schools to consolidate their law libraries into the broader university system, risking both collection depth and specialized personnel.

Budget constraints continue to challenge law libraries—especially in academic settings. Panelists then discussed sev-

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eral strategies for managing unpredictable financial landscapes, including tapping into student technology fees, foundation or endowment allocations, and setting aside funds for emergencies. One panelist emphasized the importance of utilizing restricted funds visibly to reinforce their value and ensure continued support from institutional leadership. Diplomacy and strong relationships with key decision-makers, the panelists agreed, are essential to meet modern budget demands.

Branding and marketing of collections was another topic touched upon. Both academic and law firm libraries remain invested in various forms of outreach to build awareness and engagement. These efforts include blogs, newsletters, social media, and informal conversations. Panelists also noted the alignment of collection development with institutional priorities, emphasizing materials that serve high-value user groups—such as faculty in academic settings, or attorneys in law firms. They also emphasized “making a splash” when rolling out new resources. As Moore shared, part of their branding within their institution involved curating a collection focused on developing the “well-rounded, practice-ready student,” showcasing the connection between instructional goals and collection development. However, this alignment also introduces constraints, narrowing the selector’s autonomy in favor of supporting broader organizational objectives.

As part of this shift, the panel elaborated on how institutions are embracing a just-in-time acquisition model, which supports purchasing materials as-needed. While efficient, this model can have consequences for specific patron groups—particularly those with specialized or less predictable information needs. An example given was the consequence of not serving every user group’s need when decisions are made to no longer retain certain monographs and treatises due to their costs and infrequent use.

Another key theme was the increasing reliance on digital resources—and the need for vendor transparency. Panelists highlighted the importance of understanding and communicating limitations tied to digital rights management (DRM) and licensing with users. Another good practice mentioned included keeping the most active users in the loop to maintain the uninterrupted use of the material when products are changed or discontinued.

In law firm settings, the shift to digital has progressed rapidly. Davis described her firm’s successful transition strategy, which included extensive outreach and training in partnership with vendors and by excluding print purchases whenever there was a digital version of the material. The firm’s branch offices were also equipped with their own collections and distinct policies. Crucially, the firm engaged stakeholders early when pulling print resources, allowing time to implement solutions and minimize disruption.

The panel touched on the evolution of maintenance and interaction with record data as participation in collaborative digital platforms, such as consortia, and continued purchasing of vendor catalog records will continue to cede traditional in-house control over cataloging and metadata. Using custom catalogs and other technologies, such as AI, implemented within the discovery layer will further affect how users interact with collection resources. The most provocative take from this development came from Moore, who predicted the impending “death of the catalog.”

As law libraries confront an evolving digital environment, budget pressures, and institutional shifts, collection development has become both more strategic and more collaborative. Whether in academia or private practice, the message from this panel was clear: the role of the selector is no longer just about choosing resources—it’s about advocating, adapting, and aligning with a library’s broader mission in a rapidly changing world.

AALL/Bloomberg Law Continuing Education Grant—Apply by November 10

Message from jury member Christina Tsou

As a member of the AALL/Bloomberg Law Continuing Education Grant Jury, I want to encourage you to consider applying for the **AALL/Bloomberg Law Continuing Education Grant** if your chapter, special interest section, committee, or caucus has an upcoming educational program that could use funding support.

The grant supports the development and sharing of educational programming across AALL entities. Past awards have funded speaker fees, webinars, and more.

The next application deadline is **November 10, 2025**

Learn more and apply: <https://www.aallnet.org/education-training/grants/cpe-program-grants/>



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AALL Pre-Conference Workshop – Legal AI Mastery: From Business Strategies to Research Realities in Law Firms

By *Cara Henley Johnson*
Knowledge and Research Manager
O'Melveny and Myers

The **Legal AI Mastery** workshop provided law firm librarians with invaluable insights into the implementation, security, and precision of artificial intelligence (AI) tools within their institutions. Coordinated by SCALL's Immediate Past President, **Tanya Livshits** of **DLA Piper**, and generously sponsored by **LexisNexis**, the workshop featured three panel sessions and a final interactive roundtable discussion with attendees from the **Teaching the Tech Trainers – AI Edition** workshop.

Here is a summary of the three panels that explored key aspects of AI in legal research and practice.

Panel 1: Privacy, Security, and Licensing in the Age of GenAI – SCALL member **June Hsiao Liebert** of **O'Melveny and Myers**, **Emily Florio** of **DLA Piper**, and **Lexis' Chief of Staff Mark Koussa** led a thought-provoking discussion on how law firms can safeguard privacy, assess security risks, and navigate licensing considerations when adopting generative AI (GAI) tools.

One valuable highlight from this session was the importance of conducting and understanding IT security assessments, even if managed by another department outside the law firm library. Law librarians must understand which IT security certificates the AI company has (NIST, ISO, SOC, etc.). What security measures are in place? Have they had breaches before? While we may not need to be experts in all IT certificates available, understanding what they mean, what the vendor is providing, and whether it is a short evaluation or over time is important for the evaluation for AI and other research tools.



Panelists Mark Gediman, Erik Adams, and Colleen Cable
(Photo courtesy of Cara Henley Johnson)

Key takeaway: Law librarians should take an active role in evaluating AI tools and preparing detailed risk summaries with recommendations for firm leadership. This proactive approach ensures informed decision-making regarding AI purchasing, adoption, and renewal, safeguarding both research integrity and institutional security.

Panel 2: Benchmarking AI Legal Research Tools in Practice – SCALL members, **Mark Gediman** of **Alston & Bird** and **Erik Adams** of **Sidley Austin**, along with **Harbor Global's Director Colleen Cable** shared findings from their evaluation of three GAI tools: **Lexis**, **Vincent**, and **Westlaw**. The topic and prompts were initially reviewed in February for a **SCALL Institute 2025** presentation. Using identical prompts, the panel assessed the tools based on accuracy, depth of responses, and citations to primary and secondary sources.

An intriguing aspect of this presentation was the comparison between the February and July 2025 results. While **Westlaw** and **Lexis** results were essentially the same, the **Vincent** results had changed with a previously found regulation no longer being identified as relevant. This was a newer law and maybe it should not be found, but that was debatable. This raised important questions about AI's dynamic nature and the variability of outputs, even when rerunning identical queries within the same tool.

The Q&A following the session included a heated discussion on why **ChatGPT** was not evaluated. A vendor attendee currently in his 3L year of law school believed **ChatGPT** is widely used by law school students. As many law firms do not permit the use of **ChatGPT** for legal research, or fully blocking **ChatGPT**, it was not a focus of this benchmarking example but could be included in future evaluations by other institutions.

Key takeaway: AI tools are not static. Law librarians must continually evaluate and re-evaluate AI outputs to ensure reliability and accuracy in legal research workflows.

Panel 3: Critical Thinking – Moderated by **Saskia Mehlhorn** of **Norton Rose Fulbright**, this session featured panelists **Greg Otterson**

of **BakerHostetler**, **Nick Lauren** a local Portland associate at **Schwabe**, **Taryn Marks** of **Stanford Law School**, and **Leanna Simon** of **Honigman**. The panel emphasized the importance of evaluating AI capabilities, understanding who can use these tools, identifying appropriate projects, and implementing AI solutions so it aligns with institutional goals. The presenters

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cautioned against being swayed by the allure of flashy AI tools, underscoring the need for librarians and attorneys to remain vigilant and discerning in their assessments.

Together, the panel explored the importance of critical thinking in AI adoption, providing attendees with several frameworks to evaluate AI tools effectively.

One helpful framework for AI evaluation presented was:

1. Evaluate whether AI is the appropriate tool
2. Verify whether the correct AI tool is being used
3. Interrogate your prompt
4. Interrogate the Output
5. Identify Gaps, Blind Spots, and Biases
6. Refine, Reframe, or Reject
7. Would I sign this subject to Rule 11 sanctions?

The ethical risks associated with AI misuse were highlighted as a continued concern, particularly given the prevalence of citation errors, not just hallucinated cites, in AI-generated legal research. While AI may seem like an enticing shortcut, traditional legal analysis and rigorous review remain indispensable. AI tools should complement—not replace—human expertise and judgment.

Another self-reflective framework shared in the slides was three guiding questions for considering when to use AI in legal practice:

1. Am I using AI to accelerate my thinking—or to avoid it?
2. Is this making me learn—or just helping me produce more?
3. Am I thinking better—or simply thinking less?

Additionally, attendees were reminded of two established techniques, the **SCAMPER method**, often used in technology settings, and the **CRAAP test**, used to evaluate information sources. Both can think critically about using GAI. Law librarians unfamiliar with these techniques may want to explore them further as part of their professional development.

Key takeaway: Law librarians must approach AI adoption with care, curiosity, and critical thinking to ensure its effective implementation.

The three Legal AI Mastery panels addressed multiple aspects of successfully integrating AI into law firms and was highly relevant for attendees.

I Boldly Went Where Many Have Gone Before with Help from My SCALL Colleagues

*By Ryan Metheny
Director, Reference & Collections
LA Law Library*

As expected, the programming at this year's Annual Meeting placed a large emphasis on AI—and for good reason, as this technology continues to rapidly transform legal research and the use of law libraries. The AI-related programming was so extensive that the Program Committee included a session specifically on how government law libraries are adjusting to an AI-driven world, titled: "To Boldly Go Where Everyone Else Has Gone Before: Generative AI, Policy, and Practice in Government Libraries." As the Director of Reference & Collections at LA Law Library, when I saw this program on the agenda, it felt like they had designed it specifi-



***The author, realizing he needs to do more to help his staff understand AI
(Photo courtesy of AALL)***

cally for me! Of course, I had to attend, even if it meant rolling my luggage into the meeting room for the 11:30 a.m. Tuesday, last-gasp timeslot.

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Jocelyn D. Stilwell-Tong of the Sixth District Court of Appeals in San Jose coordinated the program and assembled an all-star panel to lead the discussion. SCALL had not one, but two, members on the panel: Joy M. Shoemaker of the U.S. Court of Appeals, Ninth Circuit Library, and Brendan Starkey of Orange County Public Law Library. Rounding out the panel was another leading light in government law libraries, Andre Davison of Harris County Law Library in Texas.

The panel wasted no time laying out the vexing realities of AI use in government—and especially public—law libraries. First, as the program's title implies, government law librarians have been slow to adopt AI tools, often through no fault of their own. The legal research-focused AI products from Thomson Reuters and LexisNexis remained unavailable for public access until quite recently, as vendors rightly hesitated to make generative AI legal products available to non-attorneys. On top of this, government generally takes a more conservative approach to adopting new technology—as many of us know—and often places restrictive rules on its use when adopted. As Joy at the Ninth Circuit Library asked when discussing restrictions on AI use, "Would we have had policies like this on the use of email when it started being adopted in the 1990s?" Probably, yes! So, many of us in government law libraries now find ourselves playing catch-up with our private and academic colleagues when it comes to AI.

Nonetheless, the panelists impressed with their forward-looking approaches to getting ahead of the AI curve. In fact, they made me realize all the ways I still need to help my staff and library do the same. Andre at Harris County has developed "AI U.," a twice-monthly series of public- and attorney-focused trainings on AI in legal research. He also uses AI extensively in his own data analysis to support decision-making on, for example, where to install and deploy access points for patrons throughout a geographically large and populous county.

Brendan at Orange County, meanwhile, has led staff training demos to ensure reference librarians see what patrons are seeing with publicly available AI products like ChatGPT and Gemini. His library has also invested in a behind-the-desk-only Lexis gen AI subscription, to enable staff to experiment with the product and compare its benefits and limitations to the general AI tools patrons are likely to use. Brendan shared that the judges on his board of trustees likely only allowed this investment because their own Westlaw subscriptions include the new CoCounsel tool, which they find helpful.

The panelists also provided helpful perspectives on the limitations of AI. This was a recurring theme at the many AI-focused programs at the Annual Meeting, but I appreciated the pithiness and relevance to my own work of these panelists' insights in this regard.



The author taking a break from thinking about AI, in Washington Park in Portland (Photo courtesy of Ryan Metheny)

As Jocelyn at the Sixth District reminded us, we need to be realistic about what gen AI actually does: it's essentially a Mad Libs-like technology that uses predictive algorithms and machine learning to assemble a plausible-seeming string of words based on patterns found in the texts on which it's trained. It's not conscious; it doesn't have true, human insight. Given this, no one should be surprised when AI hallucinates or produces errors. AI will likely always need a "human in the loop" to verify accuracy, check for problems, and expand on and hone the product. At most, an AI-generated text only saves you a rough draft, and it's unlikely to ever do more than that.

However, Andre pointed out that AI nonetheless could have profound effects on access to justice. For instance, one legal aid organization in his state found that a set of rote tasks on a group of clients' cases that once took six months to complete, could now be completed in a mere two weeks with AI assistance. Once deployed at scale, this could drastically improve legal aid's ability to assist the 92% of U.S. residents who cannot afford a lawyer.

So, where does all this leave us? The panelists provided some very helpful final thoughts and questions. All seemed to agree that our challenge comes down to training and supervision. How do we help our patrons use AI safely? For instance, can self-help centers at the courts enable the supervised use of AI by non-attorney patrons, with librarian help? How do we train self-represented litigants to use AI properly when they barely have the capacity to complete their legal documents at all, even with AI assistance? Jocelyn recommended that public law librarians develop and hone an "elevator pitch" for patrons—a 30-second explanation of the dangers, drawbacks, and advantages of using AI. I plan to do exactly this with my staff.

Overall, while I may be biased, I found this to be the most insightful and useful AI-focused program at the Annual Meeting. Kudos to AALL and to the SCALL members who contributed to such a practical and timely session.



Membership News

By Angie So, Araceli Argueta, and Christina Boydston

Welcome, new members of SCALL!

- **Lise Deary** – Ropes & Gray
- **Suzanne Denbow** (student) – University of Washington
- **Manda Smith-Collins** – Brownstein Hyatt Farber Schreck, LLP
- **Sydney Triola** (student) – University of California, Los Angeles
- **Shelli Owens** – Gunderson Dettmer
- **Sophia Kingsley** – Sidley Austin LLP
- **Amy Lin** (student) – Wayne State University
- **Ashley Aviles** (student) – San Jose State University
- **John O'Donnell** – Western State College of Law

Other membership news:

- Chapman University's Hugh & Hazel Darling Law Library has many happy announcements!



Anastasia (Staci) Wright is the new circulation assistant



Sarah Hart is the new Cataloging and Metadata Assistant



Marianne Warren is the new Law Library Business Coordinator



Tina Ching is the new Director

- **Did you know?** There are currently two candidates for the AALL board who are past presidents of SCALL: Erik Y. Adams & Joy M. Shoemaker!



Erik Y. Adams



Joy M. Shoemaker

- **Serena Thomas** & her husband are expecting a baby boy in late January/early February of 2026!!! Serena's currently about 5 months into the journey and all is looking great. Both parents are super excited!



- When she is not researching statutes and regulations with Legislative Service, Inc., ... **Jenny Lillge** enjoys performing in musicals. This past June, she appeared in the ensemble of Woodland Opera House's production of "Something Rotten." For those who know the show, she did get to be a tap-dancing egg!



* Congratulations and bravo to all the members listed above! *

Any corrections, changes, or additions to your membership information, as well as any announcements for Membership News, should be sent to:

<p>Yun Ji (Angie) So, Co-Chair SCALL Membership Committee Access Services Librarian Loyola Law School Los Angeles, CA 90015 (213) 736-1126 yun.so@lls.edu</p>	<p>Araceli Argueta, Co-Chair SCALL Membership Committee Collection Management Services Specialist UCLA Law Library Los Angeles, CA 90095 (310) 825-4321 araceli@law.ucla.edu</p>	<p>Christina Boydston, Co-Chair SCALL Membership Committee Reference Librarian Loyola Law School Los Angeles, CA 90015 (213) 736-8389 christina.boydston@lls.edu</p>
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Career Opportunities

Date Posted	Job Title	Location
September 2	Senior Knowledge & Research Analyst; O'Melveny	Virtual
August 15	Systems and Electronic Resources Librarian; Chapman University Fowler School of Law	Orange
August 12	Competitive Intelligence Analyst; Wilson Sonsini	Multiple U.S. Offices; Hybrid
August 7	On-Call Global/FCIL Reference Assistant; LA Law Library	Remote; Hybrid or Onsite; Los Angeles
August 5	Librarian; California Department of Justice	San Francisco
July 17	Sr. Legal Intelligence Analyst; Cooley	Los Angeles; San Diego; or Other Cities; Hybrid
July 10	Instructional and Reference Librarian; University of Hawai'i	Mānoa, HI
July 3	Library Assistant; U.S. Ninth Circuit Library	San Francisco
June 30	Knowledge and Research Specialist; Greenberg Glusker	Century City
May 8	Temporary Librarian; Riverside County Law Library	Riverside
February 6	Reference Librarian; Pepperdine Caruso Law Library	Malibu
September 5	Librarian-Cataloging; LA Law Library	Los Angeles

By Don Buffaloe
 Chair, SCALL Placement Committee
 donald.buffaloe@pepperdine.edu

View complete job descriptions at scallnet.org/career-opportunities/



SCALL Annual Business Meeting Minutes, Tuesday, June 25, 2024

By Suzie Shatarevyan

Hybrid event via Zoom and in person at the Richard H. Chambers Court of Appeals Building, Pasadena, CA at 6 pm

A regular Annual Business meeting of SCALL was held in hybrid mode – virtually and in person at the Pasadena Courthouse on Tuesday, June 25, 2024. A quorum being present, President Joy Shoemaker called the meeting to order at 6:09 pm.

1. Approval of Minutes from 2023 Business Meeting
 - A. The 2023 business meeting minutes were sent to all members via the listserv in advance of the meeting for review.
 - B. Larry Meyer moved to suspend the reading of the minutes. Victoria Williamson seconded. Motion carried and minutes are approved.
2. Treasurer's Report
 - A. Sangeeta Pal reported that as of June 24, 2024, the SCALL bank has a balance of \$25,703.55, PayPal balance of \$38.71, and Petty Cash Balance of \$84.75, for a total balance of \$25,827.01.
 - B. There was discussion as to whether all the expected monies in the account have been accounted for and they have. Last year, there was an influx of money from the SANDALL merger membership, which we didn't have this year. Additionally, there were higher expenses for SCALL events. Jessica Whytock also noted that the budget is published in every SCALL Newsletter.
 - C. Larry Meyer moved to approve the Treasurer's Report. Daisy De Anda seconded. Motion carried and the Treasurer's report is approved.
3. Secretary's Report
 - A. Suzie Shatarevyan reported that a contested board election ran from Monday, May 13, 2024 through Tuesday, June 4, 2024. The AALL online election portal was used to send notifications via email to all eligible voters containing their election login information. The President will announce the election results and new board members.
 - B. The SCALL Wilshire Mailbox account has a forwarding credit of \$283.26 and mail forwarding is running smoothly.
 - C. Victoria Williamson moved to accept the Secretary's report. Jim Senter seconded. Motion carried and the Secretary's report is approved.
4. President's Report
 - A. Joy Shoemaker is excited for the new board members joining us. There was a board vacancy from the departure of Karen Skinner.
 - B. Volunteer appointments were processed this week.
 - C. Joy is still waiting on details for the Joint Reception at AALL in Chicago. NOCALL should be providing that information soon.
 - D. Joy will serve as the Chair of the AALL Chapter of Presidents.
 - E. Michael St. Onge moved to approve the President's Report. Daisy De Anda seconded. Motion carried and the President's report is approved.
5. Vice President's (Institute) Report
 - A. Tanya Livshits provided the Vice President's report. The Institute was held in Santa Barbara in February. The Topic was AI Unleashed: Practical and Ethical Applications for Legal Libraries. Alina Kelly led the speakers committee. The Institute had 88 attendees, and everyone showed up. The hotel was fully booked. We had to increase the rooms multiple times. Jennifer Berman's hard work with the Sponsors allowed us to break even, given the rise in expenses. It was a very successful institute.
 - B. Suzie Shatarevyan moved to approve the Vice President's report. Erik Adams seconded. Motion carried and the Vice President's report is approved.
6. Committee Reports
 - A. All the committee chairs have been solicited for their annual reports and we will get them posted on the website.
7. Awards Ceremony
 - A. Jennifer Berman announced the Vendor Service Award, which was given to Steve Roses of HeinOnline. It will be presented to Steve at AALL. The Vendor Service Award was also given to Amy Towell at Docket Navigator. All other plaques have been mailed.
 - B. There were no nominations received for the Rohan Chapter Service Award. Next year, the Awards Committee would love to present someone with the Rohan award.
 - C. We have three members who are retiring: Michael St. Onge, Larry Meyer, and Laura Cadra. These retirees will receive the Albert O. Brecht Lifetime Achievement.
 - D. One more plaque is being given to Joy Shoemaker for her service as SCALL President.
 - E. Thank you so much to the awards committee for their work. We are so appreciative of the work of the members.

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8. New Business

- A. Lifetime Membership - Jennifer Berman and Victoria Williamson nominated retired members Michael St. Onge, Larry Meyer and Laura Cadra for lifetime membership.
- B. There was unanimous agreement from members on their lifetime membership.
- C. In addition, Pauline Aranas, Malinda Muller, and Donna Gulnac were also nominated for lifetime membership.
- D. A second round of unanimous agreement was received for these nominations. Motion carried and we have a total of 6 new lifetime members.
- E. The following SCALL members will be presenting at AALL in July.
 - i. Eric Chapman will be presenting Overcoming Imposter Syndrome with Cindy Guyer.
 - ii. Michael St. Onge will be presenting 60 sites in 60 minutes.
 - iii. Daisy De Anda will be presenting on the SCALL CYIE at AALL and speaking about her personal journey.
 - iv. Jessica Whytock will be presenting on the new ABA library standards.
 - v. Michelle Gorospe is on a panel called Don't Account Yourself Out: You Too Can Excel at Budgets.

9. Introduction of the New Board/Passing of the Gavel

- A. Joy is pleased to announce the new board members.
 - i. Alina Kelly will be the new SCALL Vice President/President Elect.
 - ii. Julianne Odin will be the new Secretary.
 - iii. Elyse Meyers will be the new Member-at-Large.
 - iv. Also filling our one-year open board position is Michelle Gorospe.
- B. Joy Shoemaker virtually passed the gavel to Tanya Livshits.

10. Adjournment

- A. Tanya Livshits thanked Joy Shoemaker for her amazing job as President. She also thanked Caitlin Hunter for her wealth of knowledge as Past President, Suzie Shatarevyan for keeping everyone organized as Secretary, and Sherry Leysen as Board Member.
- B. Tanya Livshits made a motion to adjourn. Jennifer Berman seconded. Meeting adjourned at 6:36pm.

Respectfully Submitted,
Suzie Shatarevyan
SCALL Secretary
2022-2024

SCALL Executive Board Meeting Minutes, Wednesday, May 7, 2025

By Julianne Odin

Virtually via MS Teams Meeting at 2:00 pm

A virtual meeting of the SCALL Executive Board was held on May 7, 2025, via MS Teams Meeting. A quorum being present, President Tanya Livshits began the meeting at 2:04 p.m.

In attendance were:

President: Tanya Livshits

Vice President: Alina Kelly

Treasurer: Sangeeta Pal

Secretary: Julianne Odin

Executive Board Members: Michelle Gorospe and Elyse Meyers

1. Approval of minutes from Executive Board Meeting on February 12, 2025.
 - A. Julianne Odin distributed the minutes of the February 12, 2025, Executive Board Minutes in advance of the meeting for review.
 - B. Tanya Livshits moved to approve the minutes. Alina Kelly seconded. Motion carried and minutes were approved.
2. Treasurer's Report
 - A. Sangeeta Pal provided the Treasurer's Report.
 - B. SCALL Balances
 - i. Bank Balance as of May 1, 2025: \$27,998.96
 - ii. Paypal Balance as of May 1, 2025: \$38.71
 - iii. Petty Cash Balance as of May 1, 2025: \$84.75
 - iv. Total Balance as of May 1, 2025: \$28,122.42
 - C. The treasurer's report includes everything from the Institute and grants for the AALL Annual Meeting but does not yet include the expenses for scholarships, which are in the process of being disbursed. No other big expenses for this year, still waiting on some membership dues to come in.
 - D. Tanya moved to approve the Treasurer's report. Elyse Meyers seconded. Motion carried and Treasurer's report is approved.
3. Secretary's Report
 - A. Julianne Odin provided the Secretary's Report.
 - B. The SCALL Wilshire Mailbox account has a forwarding credit of \$116.76 from the most recent receipt, and mail forwarding is running smoothly. The mail continues to include advertisements for Association Sphere.
 - C. The SCALL elections are set to be held from May 19, 2025 to June 11, 2025. AALL's Election Portal is in place and a list of eligible voters has been submitted. Voters will receive log in information when the polls open. The

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candidates have submitted photos and statements for inclusion on both the election platform and in the Summer Issue of the Newsletter. The following candidates are running for SCALL board positions this cycle:

- i. Vice-President / President Elect: Sherry Leysen (uncontested)
 - ii. Treasurer: Michelle Gorospe and Martin Korn
 - iii. Member of the Board: Christina Boydston and Cara Henley Johnson
- D. Sangeeta Pal moved to approve the Secretary's report. Michelle Gorospe seconded. Motion carried and the Secretary's report is approved.
4. Vice President's Report
- A. Alina Kelly did not have anything to report.
5. President's Report
- A. Tanya Livshits provided the President's Report.
- B. Time capsules will be opened at the AALL Annual Meeting. The SCALL capsule will go to SCALL archives at Southwestern Law School; the SANDALL capsule will go to the SANDALL archives at the San Diego Law Library.
- C. The Joint Chapters Reception will be on Saturday night during the AALL Annual Meeting this year. NOCALL is taking the lead in planning and reaching out to CEB for sponsorship. Total cost will be around \$4,000 minus whatever CEB contributes as sponsor so SCALL's share will be about a third of that.
- D. Tanya will chair Council of Chapter Presidents next year.
- E. Julianne Odin moved to approve the President's report. Michelle seconded. Motion carried and the President's report is approved.
6. Committee Updates
- A. Awards
- i. Committee chair has not been reachable due to illness. Alina will contact other members of the committee as we move into awards season.
- B. Grants
- i. Gave out four \$1,000 AALL grants. Grant recipients need to volunteer for a committee for next year. Tanya already has list of recipients and is working to place them in committees.
- C. Relations with Vendors
- i. Nothing to report
- D. Newsletter
- i. The committee is in the final stages of Summer issue, which will include information on the candidates for the SCALL election. The committee plans to publish by Thursday, May 15.
- E. Nominations
- i. Had full slate of candidates and is working on annual report.
 - ii. Eric Adams will be stepping down as chair, recommends any of the current members to be the new chair.
 - iii. The board wants to see a full roster of the Nominations committee to make sure someone fills the chair position.
- F. Public Relations
- i. The committee is evaluating how they go about getting information to advertise for the Institute.
- G. Membership
- i. No updates.
- H. Programs
- i. The spring program was held Wednesday, March 19 at noon over Zoom and had 68 attendees. The first twenty minutes was used to discuss information and recommendations from the Budget and Finance committee and hold the ratification vote on increasing dues. The remainder of the program a coffee chat-style discussion on emergency preparedness, which generated a great conversation and a useful list of resources that was later shared with the listserv.
 - ii. The Programs Committee is currently working on planning the annual business meeting scheduled to take place June 18 at noon on Zoom.
 - iii. The Budget and Finance Committee's recommendation to replace the post-holiday party with an online event or raise registration fees to cover costs. The Board is in favor replacing the post-holiday party with virtual event and promoting the self-hosted local meet ups that the Programs Committee has previously pitched.
- I. IT/Website
- i. Routine tasks of updating pages and uploading new content to the website as well as addressing additions and updates to the listserv (due to change in jobs).
- J. Placement
- i. No updates. "We are continuing to post jobs to the SCALL "Career Opportunities" page and checking with employers to see if jobs should continue to be listed before each issue of the SCALL Newsletter is published. Business as usual."
- K. Library School Liaison
- i. The Library School Liaison committee is currently in the process of finalizing the awards for the 2025 SCALL Scholarship, gave awards to 3 students.
 - ii. The committee was dissatisfied with their budget this year and would like more funding going forward.
- L. Bylaws
- i. David McFadden sent a clean copy of the proposed Bylaws amendment to Tanya in April. The notice of proposed Bylaws change has to be given with the notice for the meeting. Since the Annual Meeting is in June, it has to go out 30 days prior to the meeting.

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M. Government Relations

- i. David McFadden is monitoring California legislation, what is happening with IMLS, and other federal issues. He forwarded the announcements of the AALL Advocacy Training that occurred last week. The training had good attendance including a number of SCALL members, especially from county law libraries.

7. Old Business

- A. Membership Dues increased passed with overwhelming membership approval (in the 90% range for both categories of members).

8. New Business

- A. All board members will ask their committees to submit an updated roster for inclusion on the website.
- B. From membership committee: Does the board know of any retiring members who should be considered for Life membership?

- i. Tanya will put out a call in the listserv.

C. Bylaws amendments

- i. Proposed amendments to reflect our current practices.
 1. Changing place of meeting provision to accommodate virtual and hybrid meetings.
 2. Changing regular meeting provision to remove requirement that meetings be held in particular months.
- ii. The Board proposed further changes to the provisions and will send those changes back to the Bylaws Committee.
- iii. Sangeeta moved to approve the changes to the Bylaws as amended by Board. Alina seconded. Motion carried and the proposed changes were approved.

D. Cleaning up Wild Apricot contact list – membership committee?

- i. Contacts are created any time someone engages with SCALL, including Institute attendees and vendors sent invoices. Many vendor contacts are not used regularly and many member contacts include small errors. Contacts can be archived and reused later if necessary. SCALL has a limit of 500 contacts available in Wild Apricot. Since we are approaching the limit, the contact list needs to be cleaned up now and regularly in the future.
- ii. Membership committee had asked if the Board needed anything from them and contact cleanup seems like a good fit for what the committee already does subject to guidelines established by the Board.
 1. Sangeeta will work with Caitlin Hunter to develop guidelines for cleaning up the contact list. Sangeeta and Julianne will then work together to engage the Membership committee on their

capacity to take on the clean up as a one-time project and/or on a regular basis for regular maintenance.

E. CYIE funds carry over

- i. With new budgeting principles, the Board does not provide enough funding for one intern but the committee thinks it is more beneficial to have two interns at a time. The committee is proposing they be able to carry over funds from year to year so that they can fund two interns every other year.

1. Same principle applies for Grants and Scholarships.

- ii. Tanya moved to roll over any unspent, allocated funds for Internships, Scholarship, and Grants to the next fiscal year subject to Board review of remaining funds once per year. Sangeeta second. Motion carried and the proposal was adopted.

F. SCALL Credit Card/Wild Apricot account – link SCALL's PayPal account?

- i. Wild Apricot needs a connected account for next payment. SCALL credit card is currently in Sangeeta's name so it may be closed at the end of her term. SCALL's PayPal is connected to both the credit card and the bank account and can be used for this purpose. Sangeeta will connect SCALL's PayPal to Wild Apricot for next payment.
- ii. The Board will coordinate transferring all financial/bank accounts at the first meeting of the Board with new members.

The meeting concluded at 3:18 p.m.

Respectfully Submitted,
Julianne Odin
SCALL Secretary, 2024-2026



Treasurer's Report

By Michelle Gorospe, Manager, Practice Resources, Paul Hastings LLP

SCALL Balances

Bank Balance as of September 1, 2025	\$34,425.44
Paypal Balance as of September 1, 2025	\$38.71
Petty Cash Balance as of September 1, 2025	\$84.75
Total Balance as of September 1, 2025	\$34,548.90

Committee Income and Expenses since September 1, 2025

Committee	Budget	Carry Over	Income	Expenses	Budget Balance
Admin	\$4,500.00	\$0.00	\$0.00	\$312.20	\$4,187.80
Awards	\$500.00	\$0.00	\$0.00	\$0.00	\$500.00
Board	\$2,000.00	\$0.00	\$218.59	\$0.00	\$2,218.59
CYIE	\$2,000.00	\$2,390.00	\$36.00	\$0.00	\$4,426.00
Grants	\$2,000.00	\$0.00	\$36.00	\$0.00	\$2,036.00
Institute	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Liaison	\$2,000.00	\$0.00	\$6.00	\$0.00	\$2,006.00
Membership	\$0.00	\$0.00	\$3,710.00	\$0.00	\$3,710.00
Newsletter	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Programs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Totals	\$13,000.00	\$2,390.00	\$4,006.59	\$312.20	\$19,084.39

This simplified spreadsheet, created by the Budget and Finance Committee, includes only the committees that have expected income or expenses.

**The Admin category includes SCALL's current administrative expenses, including, but not limited to: WildApricot Membership, taxes, credit card processing fees, mailbox fees, software, etc.*

***At the May 7, 2025 Executive Board Meeting a motion to roll over any unspent, allocated funds for Internships, Scholarships, and Grants to the next fiscal year was adopted.*

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2025-2026

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Submission Deadlines

The SCALL Newsletter team welcomes submission of any articles of interest to the law library community. Contact Christina Tsou, SCALL Newsletter Editor: ctsou@law.uci.edu

All submissions should be received by:

Winter 2025	November 10, 2025
Spring 2026	March 9, 2026
Summer 2026	May 4, 2026
Fall 2026	September 8, 2026



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