New Roles
for private law libraries

PLL
Voice of the private law librarian
Introduction

Many people are reinforcing their skills or learning new media during this recession. A large percentage of librarianship literature and water-cooler talk is devoted to retooling skill sets with attention to specific additional roles.

The roles of private law librarians are linked to the changes in technology and external changes faced by law firms. Law firms have rushed to reduce their law books for any number of reasons. One reason may be the re-purposing of library space into office space. Maintenance of a print collection can be labor-intensive, and books can only be used by one person at a time. Online services can serve more researchers simultaneously and can be more cost-effective than books.

Two excellent prior guides from the PLL committee are AALL Resource Guide No. 2, Expanding Roles for Law Librarians, edited in summer 1998, and AALL Resource Guide No. 8, The Changing Role of Today’s Law Librarian, edited in spring 2002. The expanding roles guide described the additional roles of records management, conflicts checking, continuing education, firm marketing and knowledge management. The changing role guide discussed a changing information culture in law firms where librarians train lawyers, negotiate contracts with vendors and manage staff.

This 2011 guide will focus on how librarians are expanding their roles with Wikis, Records Management, Legal Lean Sigma, Marketing and Competitive Intelligence, and Knowledge Management offering more value to their law firms with significant impact. Wikis are an excellent way to organize information in a dynamic, paperless environment. Records management is not new, but is becoming more integrated with the flow of information management. Legal Lean Sigma is becoming a standard that some law firms are following in achieving best practices. Marketing and CI are not new, but have more ownership and familiarity with private law librarians.
Librarians who organize information for their private law firms have discovered the Wiki. Most librarians are aware that blogs and Wikis are great for external information, but Wikis are well-suited to internal communication and collaboration.

Private Law Firms develop Wikis for a number of purposes. Nina Platt reported, in 2008, that large law firms were using Wikis among various departments. IT groups were using Wikis for internal documents, litigation support groups have used Wikis for a reporting function, and for project management. For example, law librarians at an AM Law 100 law firm experimented with an external Wiki, for librarian use only, for cataloging.

Wikis are another way for law schools to communicate and meet their educational mission. Cornell Law School has LexPop, and uses it to promote policy by the people. http://lexpop.org/index.php?title=Main_Page

Library schools, many of which are realigning themselves as “iSchools,” offer courses in Wikis. The Palmer Library School offers in LIS 577 Emerging Web Technologies, “blogs, wikis, RSS, social bookmarking, media sharing, tagging, folksonomies and more.” The School of Library and Information Studies at Texas Woman’s University offers technology courses that teach students to build Wikis. For an example of Course LS 5443, try this link: http://ls5443.wikispaces.com/.

In summary, librarians are learning how to build Wikis in library school and using that knowledge at their places of employment with great success.

Examples of Wikis

The Library Success Wiki provides a window on the kinds of Wikis that are being developed in a library environment. http://www.libsuccess.org/index.php?title=Wikis

Intranets
a. OSU Libraries Wiki Oregon State University, Portland, Oregon, USA. Uses Confluence.
b. Staff Wiki University of Connecticut, Storrs, Connecticut, USA. (mediawiki)
c. UL Staff Wiki University of Minnesota, Twin Cities, Minnesota, USA. (pmwiki)

Library and Information Science Topics
a. Environmental Scan. Environmental Scan analyses trends and issues affecting the library profession in general, and federal libraries in particular. (PBwiki) by Cindy Boeke and others
b. Library Technology Training Wiki. This wiki contains documents, resources and instructions how to make wikis using PBWiki.

Law Library Web Sites
a. Useful Research Links (developed for Summer Associates for basic topical questions). For more information, go to http://kmiles.pbworks.com/w/page/7263835/FrontPage
b. LawLibWiki. A wiki for librarians interested in Wikis for research and for creating Wikis. For more information, go to http://editthis.info/lawlibrary/

Staff Manuals & Service Point Manuals
a. Antioch University New England Library Staff Training and Support Wiki Keene, New Hampshire, USA (seedwiki). For more information, go to: http://antiochlibrary.pbworks.com/wiki/Antioch_University_New_England_Library_Staff_Training_and_Support_Wiki

Subject Guides, Course Guides, & Resource Guides
Ohio University Libraries has created four Wikis for research assistance: http://www.library.ohiou.edu/subjects/index-wikis.html

Perhaps the least expensive way to learn about Wikis is to choose a Wiki platform from Wiki Matrix, and then do it. This committee recommends starting with PBWorks, before trying mediawiki.
Changing roles for law librarians: records management is information management

Records and information management ("RIM") can be part of a law library's function. A law firm's files, whether from administrative departments such as human resources, or the work property of attorneys and client files, must be maintained responsibly and cost-effectively.

RIM incorporates information technology. Paper files will increasingly be imaged, scanned and converted to digital formats. Accurate indexing is essential for retrieval of digital or paper documents. Privileged information must be protected. Retention schedules are needed for cost savings.

Eight generally accepted principles of records and information management were released by ARMA International (formerly the Association for Records Managers and Administrators) on 3/31/2009 (http://www.arma.org/GARP). These principles are accountability, integrity, protection, compliance, availability, retention, disposition and transparency. Regulators, RIM professionals and businesses such as law firms use these principles.

Two information professionals describe their individual paths into RIM:

Donna Severino, now Vice President, Strategic Information Management, at Credit Suisse, began her library career as the Information Retrieval Specialist at CBS Inc. After four years at CBS Inc., Donna became head of reference at a mid-size law firm that is now closed. Subsequent to the closing of the law firm, Donna served in a temporary capacity as a reference librarian at a major investment bank and several law firms. She later became the Law Librarian and Records Manager at a prominent Wall Street investment bank, eventually rising to the position of Vice President of Legal, Compliance and MCD Information Services. In that capacity, she managed all of the Firm’s legal and regulatory information resources, conducted legal and regulatory research firmwide, developed and maintained the records management system for the Divisions she served, served as the Divisions’ webmaster and worked with the corporate records manager on various retention projects.

In June of 2009, Donna became the Vice President of the Records Management Department for the New York City Economic Development Corporation, where she served as their Records Officer. In November 2010, Donna obtained her current position at Credit Suisse which has allowed her to bring the best of her library and records management careers to the position.

Donna credits her success as a Records and Information Management (RIM) professional to her law librarian background and the many talented librarians she had the pleasure of working and networking with during her career as a law librarian. Donna also stated that ARMA was instrumental in providing her with the tools and education she needed to rise within the records and information management profession.

In conclusion, Donna is grateful for the opportunities she has had in her career and to be associated with such exceptional information professionals from both the library and records management professions.

For Trudi Busch, Director of Information Resources at Oppenheimer, Wolff & Donnelly LLP in Minneapolis, MN, records management is all about law firm information. Trudi explains:

“The explosion of information resources – internal and external – since the 1990’s, provides an opportunity for librarians to do more. With the transformation of the library into IR, we are no longer viewed as merely ‘keepers of the books.’ IR is all about information! We have minimized our print in favor of electronic information. We manage a knowledge management tool to capture and make available the Firm’s intellectual property, again information. The common denominator is information; therefore, the oversight for records (again Firm information) seemed to be a natural fit for us. We like to say that IR has instituted a ‘cradle to grave’ approach to managing client information – the birth of the client and matter number begins in IR, culminating with the disposition of the client and matter records at the closing of the matter, also done in IR. The seamless process for handling client information in one department is beneficial:

- Data integrity is achieved
- Teamwork – ready access to cross-trained staff
- Consistency of message in implementation of the policy.”

After Trudi’s Executive Director approached her with the idea of incorporating RIM into her IR department, the Firm hired a qualified records manager with prior law firm experience. Then, an executive committee was formed to discuss, design and implement RIM policies. Before adoption, policies were reviewed and approved by the Firm’s attorney responsible for risk management, the Firm’s ethics partner, and the Firm’s professional liability insurance provider.

Trudi explained that educational resources she and others used for all aspects of records management and records retention schedules were:

- Resources from membership in ARMA International and the local ARMA chapter
- Information from the AALL’s Private Law Libraries Special Interest Section for Legal Records and Conflicts
- Current journal and newsletter literature on records management
- Alerts to keep us current with changes and general news on records management

These days, Trudi spends less time -- about 10% of her total time -- overseeing the combined Records and Conflicts department. “As we investigate paperless solutions, the time will again increase.

Another 10% of my time is devoted to oversight of the conflicts process, leaving 80% of my time devoted to Information Resources activity,” she concluded.
Legal Lean Sigma

Legal Lean Sigma is a combination of two process improvement methodologies – Six Sigma, first developed at Motorola, and Lean Manufacturing. These methodologies have been around for a while, and that they are still relevant and in use are the result of their “flexibility and applicability to companies of all sizes in all industries.”

The goal of Lean Sigma is to “create more value with less work” through process improvement 1. Lean manufacturing looks at product development to produce a better, more consistent product. The goal is to find ways to streamline the manufacturing process and reduce cost. Six Sigma looks at the decision making process, exploring and developing ways to analyze and measure the quality of the product and find ways to identify and satisfy customer needs. The goal in implementing this combination is to achieve competitive advantage.

Committing to and developing a Lean Sigma program that will change the work process involves culture change. This is a large hurdle to be overcome in any environment, but especially in the legal industry. Companies who have instituted the Lean Six Sigma principles and methodologies have gained tools that improve productivity, reduce errors in creating their products and increase customer satisfaction. Law firms recognize the value in tools that aid in accomplishing these goals, especially in a difficult economy. The DuPont law department has adopted Six Sigma and offers an explanation of the DuPont Legal Model at its website 2.

Getting a Lean Sigma certification is another opportunity for law librarians to add value to the organization and to their careers. There are courses to become certified at each level of Lean Sigma – White, Green and Black Belt. Obtaining this certification demonstrates professionalism and commitment to developing more efficient ways of managing processes and product delivery. The emphasis now is on managing a law firm as a business, implementing corporate organizational initiatives and business processes. Lean Sigma is an opportunity to bring additional value to the firm by highlighting your ability to be a valuable player in the business of the firm – to take on new roles and contribute to the success of the firm.

Marketing

“I think in firms especially, the lawyers forget that the librarians are just as well educated as they are. They have no idea that we are able to go beyond the stereotypical ‘reference question’ and that the librarians are a good source for client development and client retention.” Joyce Janto, president of AALL, quoted in “The Value of Law Librarians at Law Firms” Law Quadrangle, Spring 2011 http://www.law.umich.edu/quadrangle/spring2011/specialfeatures/Pages/TheValueofLawLibrariansatLawFirms.aspx

Many law librarians are making significant contributions to the law firm marketing effort and the competitive intelligence function, and a few have even taken over that responsibility. According to the AALL (American Association of Law Libraries) 2009 Salary Survey, 11.5% of private law librarians responding to the survey have other departments under their jurisdiction, up from 10.8% in the 2007 survey. Here are eight areas where the expertise of a law librarian will add value to the final product and contribute to the bottom line:

Current Awareness – Clients and the Legal Industry
Lawyers need to stay current on legal industry developments and what their competitors are focusing on. They need to know what is happening in their clients’ industries and the events involving their clients. Pulling this information, setting up news alerts or making industry web sources available in one area of the intranet/portal is easily achieved with the electronic resources available to the library staff. A law librarian can develop a process that best meets the needs of the firm.

Research for Client and/or Practice Development
In depth background reports can be created using the various tools at a librarian’s disposal. A structured framework can include reports on the potential client’s history, place in the industry, market share, finances, corporate structure – and in the case of IP, intellectual property held. Law librarians can contribute to a presentation to a potential client.

Speaking Opportunities and Presentations
Lawyers’ speaking engagements and presentations before bar, trade and educational groups necessitate background research. The skills of a law librarian in supporting these speeches and presentations can free lawyers’ time for billable work. Librarians can speak before professional groups also. Groups such as the local paralegal association, legal administrators group, bar associations and even the local ARMA chapter for records administrators might be interested in presentations on internet technology and legal research. Another potential group is the local library community which might appreciate a presentation on basic legal research tools. These are additional ways of marketing the expertise of the firm.

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1 “Lean six sigma: red hot relevance: recent advancements make the process improvement methodology more applicable than ever,” Doug Burgess. 49:6 Quality 42. June 2010.


3 http://www.dupontlegalmodel.com/initiatives/six-sigma/

For additional information about Lean Sigma, this committee recommends the following:

http://www.law.umich.edu/quadrangle/spring2011/specialfeatures/Pages/TheValueofLawLibrariansatLawFirms.aspx
Research, Reference and Technology Services for Clients
Offering services to clients is a benefit to the firm and client. A librarian’s review of the types of services that could be offered should take into consideration licensing, copyright and legal ethics issues. Even if the client rarely takes advantage of the offered service, the goodwill earned benefits the firm. A law librarian can research, implement and promote alert services for news or legal developments or access to the library collection. The offered services can be billable or complimentary “client development” initiatives, whichever firm management prefers.

Newsletters, Client Communications
Most firms have in-house publications that are disseminated to clients and potential clients. The law librarian can support the creation of these client communications. Resources on topics of interest can be monitored and articles on current legal topics of interest can be collected and passed to the staff creating the communications. Many law librarians have written for their firms’ professional publications.

Maintaining and Updating Directories, Tracking of Deal News, Surveys
Firms still find value in legal directory listings – especially directories which rate the lawyers listed. A law librarian can take on the responsibility for updating listings and verifying the accuracy of published material and tracking the listings of potential lateral candidates. A law librarian can track news about the firm and alert the administrators to any positive or negative content. Some firms are very active in corporate deal work and need to publicize their involvement. The library team can check vendor databases to make sure the firm is getting credit for the work done on the deal. League tables play an important role in the marketing of the firm’s expertise. Legal industry surveys provide another opportunity. For many surveys done on the legal industry, firms are often asked to fill out survey forms. This is another opportunity for using the expertise of a librarian in an additional role in the firm.

Mailing List Maintenance, CRM Data Maintenance
Many firms now have CRM (client relationship management) software in place. Database management is an easy expansion of the librarian’s role. The skills needed to organize and verify data are in use in the law library every day. CRM database management is an extension of those skills. If there is a team already in place for this task, they may need access and training in the resources needed to verify the accuracy of the data being input into the system – corporate names, relationships of subsidiaries, industry codes, etc. – another efficient use of a law librarian’s knowledge and expertise.

Web and Portal Design and Management, Web 2.0 technology, Social Media
Blogs, wikis, Twitter, podcasts and video are all tools familiar to law librarians. Firms are using these tools to expand marketing initiatives in increasing numbers. Librarians can use their knowledge and skills as administrators or content providers to enhance the value of these tools to market the firm.

These are just eight areas where a law librarian can bring value to the marketing and competitive intelligence initiatives of the firm. There are certainly others, depending on the culture and focus of each firm. Investigate the untapped potential of your law librarian.
Alert and dedicated law librarians can add tremendous value to their firms' institutional memories by developing ways for attorneys to easily access work products contributed by others. Hawkins, Delafield & Wood LLP Library Director Kathryn McRae describes the development of knowledge management at her workplace.

Hawkins Delafield & Wood LLP, a law firm with a 150-year-old practice, had many underutilized resources when Kathryn McRae started in her position as Library Director over 11 years ago.

"The Firm had valuable memos of law, answers to requests for proposals, statistics, and more in file cabinets and loose paper which was difficult to share with the now seven locations of the Firm", she said. Kathryn recognized a need for expanding the reach of the internal firm memory that is valuable to the Firm attorneys in their practice.

At the time, their budget was limited so they leveraged the Firm web server and web based catalog software to create a Library website and additional databases within the catalog. Using the firm’s web server to publish the information allowed the firm to access various internal memory through the use of these databases. The librarians at the Firm developed the databases to capture internally produced work product which saved time and shared lessons learned throughout the Firm. They also added practice-relevant news feeds through the use of widgets to each practice area page. This allowed the user to receive even more relevant and up-to-date information without having to go to another external resource.

"From an economic perspective we have saved money – for instance, we reuse already purchased legislative history and statistics. We have a database attorneys can easily search for accurate results so that there is no need to repurchase the same information. The Firm’s document management system cannot deliver this advantage," Kathryn explained.

The website was expanded by the librarians to create a Firm-wide intranet representing each department at the Firm. This opened even more communication and resources to the attorneys and staff.

The librarians’ role continues to evolve at a very fast pace. The ability to identify and also, to a certain extent, anticipate needs of the firm is critical to staying competitive in an ever changing information world.

Kathryn’s master’s degree in library science, law degree, and experience in a variety of library areas contributes to the valuable insights she brings to the firm. “This is a very exciting time to be working in the field of Law Librarianship. I’m looking forward to what the next ten and twenty years bring to the profession," she concluded.

Jennifer Alexander has been working in special libraries for fifteen years. For the last 5 years she has been conducting business intelligence for law firms. In her current position as Business Analysis Manager at McKenna Long & Aldridge, LLP, an international law firm, she works closely with the Marketing Department to gather and analyze information on companies and other law firms. She also integrates legislative and industry information with her reports. Though Jennifer is not currently working as a reference librarian, her successful skill transfer to a department outside the library makes her a role model for many librarians.

As have many other librarians, Ms. Alexander adds value to her department by writing company/industry profiles (both legal and corporate) and preparing presentations. Jennifer also trains the marketing staff in research techniques.

Jennifer learned business print and online resources while attending the MLIS program in New York City’s Pratt Institute, where she focused on business information. She honed her skills through positions at an investment bank and consulting firms. The consulting firm arena is where she gained the skill set of adding value beyond just gathering data. Jennifer recommends that anyone entering the special library field should try to gain diverse experience that will enable them to add value to the firms they will likely join.
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For more information visit the
Private Law Libraries Special Interest Section web site
http://www.aallnet.org/sis/pllsis/