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LAW FIRM MANAGEMENT

The Future OF Library AND Research Services

Confront the **THREE MAJOR ISSUES** with commitment by management and librarian, and a 'RIGHT FOR MY PRACTICE' model can be developed.

By Raymond M. Jassin and Marjorie Jassin

Your firm's law library and research services impact on many aspects of your business. But with all the technology available today, where do you turn to secure the best deal on online services? How do you know what books you have and where they are located? How can you track expenses for your library and know what to buy and what not to buy, as well as which format will suit your firm's needs?

How do you know if the resources you are paying for are really being used? If your library is shrinking, why are your costs increasing?

These are some of the questions being asked by managing partners and administrators faced with the management questions that present themselves in law firms of any size. In this article, we will discuss the major challenges that not only exist today for law firm libraries and research services, but that will continue to impact in the near future. We will also propose some simple, efficient and effective solutions to managing all aspects of your law library, and discuss some new solutions on the horizon in research services.

The Big Three

There are three major issues impacting law firm libraries today. The first is the trend toward delivery of information to the desktop, and how that impacts

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the choice of management tools and personnel to track costs, users and usage, passwords and subscriptions, as well as the integration of free legal sites and resources in order to keep down the rising costs of online research.

In addition, every firm has a complex need for resources since many attorneys' research styles differ—i.e., some prefer online research and some prefer researching with print material.

As noted during an education session at the American Association of Law Libraries' annual convention in Boston, online legal services are growing at a faster rate than books. And, as discussed in a recent article in the June 2004 issue of AALL's Spectrum, as the legal information environment becomes more complex, the need for trained intermediaries with expertise in managing information resources in law firms is growing.

Another issue impacting law firm libraries, also noted in the June 2004 issue of Spectrum, is the human resources crisis that is developing in the law library profession as a whole.

First, while professional law librarians will be retiring over the next five years in substantial numbers, declining enrollment in Masters of Library Science programs indicates that a dramatic shortage of replacements will become a major problem for law firms. Salaries that do not seem commensurate with the education requirement of a Masters in Library Science degree is cited as one of the primary reasons for the lack of success in recruiting adequate numbers of candidates to the profession.

But also, while the trend in legal publishing toward online services has triggered growth in the need for professional staffing, it has also meant that the non-professional staffs that many firms use in

their libraries are not as adequate as they use to be. Clerical staff just cannot keep up with the changes in products and services, and how and whether they should be used. And so, for the small to medium-size law firm that is using a library clerk to maintain a print collection as well as perform other duties, the gap in professional library services that need to be provided to the firm will widen and become increasingly more difficult to fill.

The final issue facing law firm library and research services today is the lack of reasonable choices in technology platforms supporting the management infrastructure of firm libraries of all sizes. While passing through the exhibit hall of AALL's annual convention, we were struck by the fact that technology companies targeting the library seem to still be focusing mainly on the mega-firm market, as indicated by the pricing and fundamental structure of their library software.

In addition, we are not convinced that law firms are well served by documenting their resources with Library of Congress classification systems. With the exception of some global mega-firms with central libraries, these systems appear to be better suited for large academic or institutional collections with active circulation tracking needs. They are also overly complex and too expensive for the majority of small to mid-size law firms.

What Are the Solutions?

How can law firms address these issues and create some reasonable solutions, given the complex mix of rapidly changing factors? Also, what challenges will firms face as these issues are addressed?

Our recommendation, to start, is to begin to customize your library to fit your firm, by

total engagement of firm management in the creative process.

The first step in this process is to carefully choose the right library and research management team. The team should consist of people who have a real understanding of the firm's information needs as well as the priority given to the library, both financially and in its role in the business of the firm.

Ideally this team should consist of a library or managing partner, librarian, IT professional and administrator. The group's chemistry and ability to work as a collaborative team is essential to creating a dynamic and successful resource center. The team can consist of library consultants and firm personnel and should meet and communicate frequently as you begin to customize your infrastructure.

The first task of the team is to conduct a complete library audit. This exercise will aid in the decision-making process in regards to finding the best combination of print and electronic resources for the firm. As the legal publishing industry competes by the rapid introduction of new products and services, the library team will be challenged to keep abreast of the latest offerings as well as to communicate with those attorneys affected.

The second challenge will be to evaluate the right combination of staffing required to manage the seamless flow of print and electronic resources throughout the firm. The team should evaluate candidates for library positions with a view toward the skills required to manage the day-to-day operation of the library. There are many educational disciplines that lay a strong foundation for development of a law firm librarian.

For firms that don't have a professional law librarian on staff, the team can consider supplementing staffing gaps by using the services of professionals throughout the country who provide seminars, training sessions and other learning opportunities and mentoring services. Entrepreneurial librarians, including those in library consulting and services companies and those who author articles and books, give seminars on legal research, and publish Webzines and blogs—all have developed and are still creating solutions to fill the need for the knowledge and experience amassed by years of law firm librarianship. One well known contribution by a professional law librarian is Andy Zimmerman's Research Guide, now available for free on the Lexis site, www.LexisNexis.com/infopro/zimmerman

Law firm librarians, in particular, have been motivated to create solutions more relevant to the world of private law firm libraries, largely out of frustration with the lack of programs relevant to a law firm, as opposed to a law school. Cindy Chick [www.LawLibTech.com] and Sabrina Pacifici [www.LLRX.com and www.beSpacific.com] each have published invaluable blogs and award-winning online sources of information useful to law firm librarians and legal researchers.

Another example of a newly created solution is Internet for Lawyers [www.netforlawyers.com], founded by Carole Levitt who developed CLE accredited seminars to teach lawyers how to research the free legal information on the Internet. She, along with her husband, Mark Rosch, recently authored the ABA Law Practice Management Section book entitled "The Lawyers Guide to Fact Finding on the Internet."

The collaboration of a law firm with its own entrepreneurial librarian is exemplified in Genie Tyburski's Virtual Chase [www.Virtualchase.com], another online source of important information to the legal community.

As the potential shortage of candidates entering the field plays itself out, more professional law librarians will have opportunities to bring their own entrepreneurial vision and solutions to the legal profession.

Also, new services will need to be provided. For example, an emerging trend in legal research is on-demand legal research; with the new service from LexisNexis, the service is billed at \$140 per hour, and the charges appear on the subscriber's Lexis bill. Library services companies that now only provide looseleaf filing will, of necessity, have to develop other ways to serve—i.e. by offering administrative, research and clerical services—to offset the decline in publication of journals and looseleaves.

If professional law librarians don't find ways to bring solutions to staffing gaps that may result as the human resource crisis issue plays itself out, an underserved need can then become a business opportunity! So, the staffing challenge is for both law firms to revisit the education requirements and salaries for the library, and for librarians to think beyond the traditional roles of the past.

Meeting the Last Challenge

The last challenge is to create a suitable infrastructure that is in line with the size and information demands of the firm. As new technologies begin to emerge in business, opportunities exist for developing customized solutions that are far more reasonably priced than the library technology platforms currently on the market.

Libraries are compatible venues for extranets that can be developed with these new technologies. The emerging trend in the technology sector is toward low cost, hosted Web-based software that offers easily deployable and customizable solutions.

One product that recently withstood a two year beta test by our own management company is Intuit's QuickBase. Located independently by us and used primarily as a knowledge management tool in corporate America, this product also turns out to be very suitable for use in law firm library management.

This customizable, Web-based software affords a practical and IT issue-free platform adaptable to the tracking needs of most law firm libraries. Using a

technology platform with a starting price of \$249 per month, this low cost solution has passed our test for reliability, ease of use, ease of deployment and enormous capacity. Intuit's support has, thus far, been exemplary.

Utilizing this type of technology, we found that for most firms, a simple database that searches across fields, including a location field indicating the precise location of the material in the firm, satisfies the basic function of documenting a collection. Expanding on our earlier comments, Library of Congress classification doesn't serve law firms well, in our opinion, because it doesn't tell an attorney exactly where the book can be found, especially if the firm utilizes corridors, attorneys' offices and conference rooms for shelving the collection.

We find Web-based databases are the most useful technology a library can use to serve its many tracking functions. Librarians must track library expenses, purchases, books borrowed from and loaned out to other firms, requests for reference and research assistance, training sessions for attorneys as well as many other services and data regarding the library's resources.

With proper tracking tools, librarians can easily "audit" library expenses and usage of resources frequently. In a rapidly changing environment, these tools will be essential in making informed management decisions.

The other benefits of a hosted library extranet is that it affords easy flexibility in staffing models, as access isn't restricted to physical location. This offers, for example, an opportunity for the firm to connect branch librarians interactively, thereby maximizing the firm's human resources. This technology would also provide an opportunity for firms to create services targeted to clients, thereby creating possible new revenue streams.

The creative combinations are countless, and the potential is enormous, for a brave new world of law firm librarianship to develop over the next five years—with the commitment, by management and librarian, to develop a "right for my practice" model. •

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