

Communication is Key for Librarians and Publishers

by James A. Mumm

Technical services librarians have a responsibility to effectively communicate issues about automated legal information to colleagues, patrons and the producers of this information.

Legal information is neither created in a vacuum nor distributed haphazardly. Publishers evaluate each product to see how it fits into the product line, the customer mix and in overall business goals. One responsibility for librarians — often technical services librarians — is to understand publishers' goals or strategic directives and, more importantly, to explain libraries' desires to publishers. Technical services librarians must stay abreast of how publishers are growing, the nonprint products being developed, and how publishers are marketing these products. They need to understand the implications of these products and publisher decisions on their libraries' catalogs, Web pages, budgets and overall operations.

Librarians must effectively communicate within their own institutions and among their peers as well. They need to ably explain not only whether a title is purchased or how it is cataloged, but also what new technologies publishers are exploring. It is crucial for librarians to understand the implications of contracts and license agreements, how products work, and how (or whether) libraries will be able to use the products in the context of the agreements and in individual settings. Librarians must fluently discuss how emerging technologies and products may affect the buying power of the librarian and the library as a whole. So technical services librarians need to position themselves to clearly understand the publishers' objectives and the implications for their libraries.

For example, a publisher may produce an Internet service that fits a particular

attorney niche very well but is inappropriate to the goals of a law school or research needs of its faculty. Librarians are often responsible for informing or working with the publisher to help it understand the needs of the library community. After the librarian has collaborated with the publisher, perhaps the publisher can revise the product or develop alternative products more appropriate for the library. By the same token, librarians may better understand how the product might be implemented in their environment. So communication between the library and the publisher is vitally important.

Technical services librarians (frequently acquisitions or serials librarians) need to understand issues such as license agreements, payment and contract details, and library commitments. They frequently have the ear of at least the sales and customer service representatives in the publishing organizations. Because catalog librarians understand how best to integrate products or services into the catalog, they can speak to issues surrounding inclusion of resources on libraries' Web sites. Catalog librarians understand how links are established in the catalog and are often developing methods to make the catalog more universal. On the other hand, electronic resources or computer services librarians are best able to grasp technical details about access to Internet and outside sources, use of compact discs in the library environment, interfacing with laptop computers and personal digital assistants, and alternative formats that publishers might consider. Reference librarians are in the best position to evaluate how products may or may not be used in a given setting for faculty or attorney needs. Finally, other staff members bring their own perspectives in dealing with the variety of resources

Value-Added: Technical Services in the 21st Century

Melville Dewey was astounded by the lack of efficiency and wasted time and money in constantly recataloging and reclassifying books by location. Instead he created a system of classification by subject that could be shared by libraries everywhere [Melvil Dewey, "Decimal Classification Beginnings," *Library Journal*, 45:151 (Feb. 15, 1920)].

Later in the 20th century, the development of card catalogs expanded access to law library collections by providing access points by author, title, subject and series. In most libraries, automation began in technical services with the advent of the online catalog. Later access to materials was again enhanced by the automation of acquisitions and serials check-in functions that improved work processes and provided more information for patrons regarding the order and receipt of materials for law library collections.

The 21st century presents new challenges and opportunities for technical services librarians. The advent of the digital age, with its emphasis on electronic resources, has increased the complexity of the fundamental nature of technical services to add value to the resources and services that law libraries provide. As the articles in this Members' Briefing demonstrate, technical services librarians are rising to the challenge!

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libraries obtain or use. Different institutions divide duties and responsibilities in different ways; some library staff members are assigned duties that overlap and crossover into other departments of the library. This mix of people can and should collaborate in reviewing publishers' offerings, in defining the library's position on acceptance of information, and in helping publishers identify what is useful in a given environment.

To this end, libraries should develop an Alternative Formats Committee, composed of a combination of technical services librarians, electronic resources or computer services librarians, public services librarians, administration, and clerical staff. The committee would review issues such as policies relating to automation, including collection development, acquisition, processing, retention and circulation; individual products that publishers want to introduce to libraries; how individual product formats relate to the existing collection and how they may relate to other alternatives; licensing issues that are important to the library; providing access through the catalog and/or library Web

site; how and by whom resources will be maintained; the librarians' role in understanding and "teaching" the materials to patrons; and publicity.

Libraries are no longer in an era where they merely buy, shelve and maintain books. Information and resources in alternative formats require the expertise of various library staff. But it's the technical services librarians that play a vital role in facilitating information and communication among the library, its patrons and publishers.

James A. Mumm (jim.mumm@marquette.edu) is an acquisitions/serials librarian at Marquette University Law Library in Milwaukee, Wisc.

Contributing to Organizational Effectiveness

Technical Services in Public Law Libraries

by **Janice Shull**

The unique environment of state, court and county law libraries calls forth a new vision of technical services that emphasizes the connections they create for and with their users. Like a follow-the-dot picture, the segments that technical services librarians add through creative technical services join with other lines in the overall picture of American justice administration.

Recent demands for building public trust in the justice system have reached the courthouse — and court libraries share in that responsibility. Public law librarians must educate themselves about the mission and goals of their parent organizations and actively collaborate with them in realizing those goals. Working with committees, boards and commissions engaged in the administration of justice is one approach. Technical services librarians often participate in court Web site committees. In one state, technical services librarians supervised redesigning a self-help center for the court and planning improved access between circuit courts. Another technical services staff created a comprehensive bibliography of juvenile justice resources for the Juvenile Justice Commission Advisory Board.

Collaboration within the library — such as scheduled time at the reference desk or development of research guides and public relations materials — offers technical services librarians the added benefits of viewing the library from the

user's perspective and a chance to demonstrate research expertise acquired from technical services work. "Without the information and experience garnered through interactions with users and the court, it would be difficult to judge the needs of your clientele," said Amy Crowder of the Wisconsin State Law Library.

Good collection management depends on close collaboration with users. Diverse user groups, including judges and law clerks, practicing members of the bar, historians, students, and pro se litigants, demand utmost care in balancing resources to satisfy a range of needs. Acquisitions librarians purchase cost-effective resources and carefully weigh the research needs of constituent user groups. Serials librarians ensure that resources remain current and evaluate retention policies for noncurrent materials. Shifting, shelf-reading and weeding projects, often conducted collaboratively by reference and technical services staff, help librarians identify problem areas and familiarize themselves with the print collection.

The catalog, a long-cherished symbol of technical services, has been converted from a little-understood, underappreciated box to an interactive tool accessible to everyone. Online catalogs have become the most popular feature of many libraries' Web sites. With such value-added features as location information, serial holdings, contents notes, hot links to electronic resources and feedback forms, each library's

Online Public Access Catalog informs the world about the library and its mission.

Court libraries maintain our link to the past. Preservation of older materials is an ever-present concern. In many states, the highest appellate court library is the oldest law library in the state. The age of these libraries reveals much about their collections: comprehensive but crumbling. Through training in book repair, knowledge of binding options, awareness of environmental conditions and involvement with digitization projects, technical services librarians proactively preserve the rich history of legal publishing represented in their collections. Technical services librarians are usually responsible for the library's special collections and legal history materials. Combining interests in preservation and legal history with technical services skills can foster new areas of research for the librarian.

Assisting "outside" groups heightens the visibility and awareness of the skills of technical services librarians. Attorneys seek the expertise of the court's acquisitions librarian for purchase advice or disposition of their law books. The preservation librarian assesses the condition of a judge's treasured book. A sister court requests information from the cataloger about available library management software. Colleagues in public and academic libraries request help from the state law library's technical services staff in collecting and organizing

legal resources. Management of judges' chambers libraries offers technical services librarians face-to-face contact with court staff.

Technical services librarians in a public law library contribute value to their organizations far greater than the sum of their parts. While carrying out the traditional technical service functions of selecting, acquiring, cataloging and processing materials, technical services

librarians in public law libraries also contribute to the work of their organizations in nontraditional ways. An increased dependence on technology at courts and government agencies has strengthened ties between the library and other departments. Today's technical service librarians understand that their work directly affects the ability of their parent organizations to effectively participate in the American justice system. F. Dale Kasperek Jr. of the National Center

for State Courts recently predicted that the role of the court librarian will evolve into "the one and only knowledge manager for the court." By connecting users with information resources and working collaboratively within the organization, technical services librarians feature prominently in that picture.

Janice Shull (jshull@lasc.org) is head of technical services at the Law Library of Louisiana in New Orleans.

Syracuse University's Adventures in Re-engineering Technical Services

by Andrea Rabbia

A few summers ago, Syracuse University's law library re-engineered its technical services department because of its lack of efficiency. Day-to-day tasks were not accomplished in a timely or accurate manner; latest receipts were not displayed in the public catalog; faculty did not receive materials routed to them; and collection developers created duplicate order requests because they saw no evidence that their books had been ordered. Two years earlier the law library migrated to a new Integrated Library System, using an automated serials check-in system for the first time. The department was moved to another location a year earlier. The technical services department also underwent significant staff turnover, and the library's services were declining. As a result, we could not undertake new service requests. The time had come to re-evaluate our department: its mission, goals, strengths, weaknesses, what we were doing, what we were neglecting and why. It was time to re-engineer.

As I evaluated the department, I noticed many areas where re-engineering technical services could benefit the entire library. The acting director, who was from technical services, agreed that we were ripe for change. We both had ideas for changes we wanted:

- allocating the workload fairly,
- increasing the accuracy and integrity of the database,
- making processes more linear; eliminating unnecessary "loop-backs,"

- providing staff with the training and skills they desired,
- reducing the amount of time materials lingered in technical services,
- improving government documents processes, and
- eliminating cracks where materials or processes might disintegrate.

Before beginning any re-engineering process, have a clearly defined purpose. Our primary objectives were to ensure that mission-critical tasks were accomplished (both department-wide and job-specific tasks), to be flexible how tasks are performed and by whom, and to increase time resources so we could meet customers' needs. Although we had purposes, as well as ideas, for improving technical services, we did not want to dictate or impose them on the staff. We hoped that the staff would recognize the department's problems and offer creative solutions to resolve the issues. Most of our staff are M.L.S. students at Syracuse University, so they are an ongoing source of creative ideas.

With a firmly established purpose, we were ready to begin re-engineering. The technical services staff met in July to discuss goals. We described the big picture of the library's role at the college and the university, reiterated the library's mission and goals, and identified some of our objectives. We asked each staff member five initial questions: What is the most important thing you do? What is the least important thing you do? What would you

rather be doing (work-related)? Does everything you do contribute to accomplishing our library-wide mission and goals? If we didn't have student workers, what would we neglect?

The answers to these questions established the priorities and diagnosed the problem for the declining level of service for the new ILS. For instance, few tasks made it to the "least important" list. As a result, we created a new "priority" category: the "middle of the road." "Middle of the road" tasks are important, somewhat time-consuming duties, but they are often neglected because neither the public nor the director sees the evidence of their neglect. Three priority lists emerged based on staff duties and responsibilities. We analyzed these lists against our initial priorities to see what matched. A surprising consensus was that mail check-in was one of the most important functions of the department. Staff was adamant that the day's serial receipts be checked in on the day of arrival, on the correct record and with the correct treatment. They were frustrated with correcting the mistakes that public services often returned documenting the students' errors. The technical services department had diagnosed its problem: They were not spending time where their priorities lay.

We then implemented re-engineering solutions by restructuring the department. We began the process by addressing how materials flowed, starting with the arrival of the mail each morning. With staff input, we spent a week devising several diagrams to divide work, combine tasks, cross-train, make processes more linear and create "pairings of duties." Pairings of duties involved cross-training staff so that a staff member could perform the duties of another staff member to accommodate absences and staff turnover. Each staff member now has one area of expertise plus

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a basic understanding of another's duties so that critical tasks can be accomplished. We then paired the duties to balance workflow and interests, with all staff sharing responsibility for serials check-in.

The method of how the technical services department of Syracuse University's law

library re-engineered may not necessarily be suitable for another library, but the process itself can be adapted to any technical services department. Once implemented, the re-engineering procedures will also provoke those involved to continually evaluate and adapt operations to meet users' *immediate* needs.

Re-engineering is not burdensome, so don't delegate it to a consultant, because the librarian will lose that intimate

knowledge of his or her purpose. Start with a clearly defined purpose, explain it to the staff, and they too will welcome the opportunity to participate in creating solutions.

Andrea Rabbia (arrabbia@law.syr.edu) is a technical services librarian at the H. Douglas Barclay Law Library of the Syracuse University College of Law in Syracuse, N.Y.

Bringing Value to the Law Firm

by **Brandi Ledferd**

Law firm libraries fortunate enough to have a technical services librarian on staff benefit from the value of his or her services and skills in the traditional technical services areas of cataloging, acquisitions and serials management. However, technical services librarians must look beyond the library and assess their jobs from their firms' perspective. Technical services librarians should demonstrate how their positions add value to their firms by supporting the firm's mission.

The skills and position of a technical services librarian within the library prepare him or her to tackle fundamental issues in the operation of the law firm: the use of emerging technology to control and share information, and pressures to improve the bottom line. By drawing attention to these contributions, librarians demonstrate their value in terms the firm can understand. This is especially important for technical services librarians who do not provide reference or other public services, whose contribution may not be immediately apparent to the firm.

Maximize the Systems and Assets in Place

Ideally the library will have an Integrated Library System, but whatever system it uses, that system must be customized to each individual firm's specific needs. Become intimately familiar with all the quirks and features of the library's ILS in order to move beyond out-of-the-box service and implement processes tailored to the needs of the firm. Because access to the collection is essential, cataloging and procuring as many library resources as possible into the catalog is an essential role for the technical services librarian. Developing and maintaining the library

catalog is the most visible way in which the technical services librarian adds value to the library and the firm. However there are other ways to demonstrate the library's value besides incorporating all acquisitions into the catalog:

- Adapt standards like Machine Readable Cataloging and Library of Congress to the firm's library usage needs and/or create additional search taxonomies based on specific practice groups or departments.
- Use the acquisitions module of ILS to generate budget reports customized to reflect expenditures by specific offices or practice groups. Distribute the report to the groups and work with them to analyze the reports to identify areas in which funds could be spent more effectively.
- Customize the library's Online Public Access Catalog interface and publicize its online catalog within the firm regularly.
- Develop a good relationship with your information technology department. Collaborate with information technology staff to integrate the library's system with other systems at the firm, such as portals, accounting software, e-mail programs and its intranet.

Stay on Top of Technology Trends in the Legal Industry and in General

Technical services librarians are expected not only to keep their library skills up to date but also to continually educate

themselves about technology. A law firm library may not have the luxury of having such specialists as a computer services librarian or an electronic resources librarian on staff. Often the technical services librarian assumes these responsibilities.

Technical services librarians at law firms also need to be aware of emerging technology products specific to the legal industry. New innovations in nonlibrary areas trickle down to or are adapted by libraries, so it is imperative to keep up with the technological developments in the legal community. Technical services librarians must be aware of the technologies the firm and others use and future technological products on the horizon. Observe how these technologies interact; become familiar with the standards behind them; and devise methods to integrate them with library technology to share information and improve workflow. Read publications such as *AmLawTech* and *Law Technology News*. Attend conferences such as *American Lawyer's* "LegalTech," if possible.

The effort to expand beyond the library increases technical services librarians' transferable skills and positions them for survival in the changing world of private law librarianship. At the same time it creates value for the firm. It's a win-win situation for all involved.

Brandi Ledferd (brandi@prestongates.com) is a technical services librarian at Preston Gates & Ellis in Seattle, Wash.