

The Evolution of the Law Firm Library Function:

Transformation and integration
into the business of law



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Executive summary

It is undeniable that the modern legal library is caught in a transformative stage. The aftereffects of the 2008 financial crisis continue to ripple through the legal profession in general; although global economies are in recovery, progress is slow and incremental, and support functions are at the forefront of the agenda as firms look to cut operational costs. Often seen by firm management as unnecessary and outdated, legal libraries are facing a double-pronged challenge: it is now essential for librarians to demonstrate the continuing value of their profession whilst battling with shrinking budgets and the development of new, disruptive technologies that are transforming working practices and processes at a rapid rate. This has meant that now, more than ever, libraries are at risk.

However, the traditional knee-jerk responses to such threats and challenges – such as downsizing and outsourcing – are now not enough. Instead, the modern librarian has been compelled to innovate, transforming their role to one that embraces the possibilities that new digital resources bring and which has become more centered on information management. Similarly, the way in which the library functions has been forced to change in response to economic pressures; like other firm departments, the law library increasingly must apply principles and practices from the corporate world to its operations, in order to reduce costs and improve services. Indeed, the role of the library is transforming in the face of a dynamic and sometimes hostile climate, reforming itself from a semi-autonomous department to a fully integrated and agile facility that must embed itself solidly in a firm's everyday activities and respond quickly and efficiently to its challenges and queries.

In this period of extreme upheaval, it is essential for both library and firm management to seek the right guidance in negotiating these challenges. Heavy emphasis is often placed on technological innovation and digital resources, and their current and future impact, due to the exciting and revolutionary potential these modernizations bring. However, what is of more value is tackling those difficult issues libraries face as they

reform their operations to more resemble a corporate model and as the focus shifts towards profitability. Packed with constructive advice and fascinating insight from a range of industry experts – from librarians to knowledge officers and consultants – *The Evolution of the Law Firm Library Function: Transformation and integration into the business of law* seeks to provide the most pertinent and practical intelligence about the current challenges and the most effective ways of negotiating them. Invaluable advice is supplemented by pioneering, real-world examples of alternative methods of library management that can provide a solid foundation for application and implementation.

The concept of the modern law library goes hand-in-hand with running your library like a business, which requires being fiscally responsible, utilizing metrics to measure ROI and value, and ensuring your target audience is knowledgeable of and satisfied with the solutions and services the library provides. The difficulty for most librarians and library management, however, is taking those first steps. In chapter 1, Monice Kaczorowski – vice president of library strategy and innovation for Feit Consulting – provides guidance in understanding the various tools that support the running of a library like a business. The multiple ways metrics can be utilized – from monitoring usage and trends to adjusting a library’s portfolio of products and contents – are discussed, before various metrics are offered as a starting point for implementation.

In the current economy and competitive marketplace, law firms have dramatically changed the way they conduct business. The impact of these developments has rippled throughout all departments; however, nowhere has it been felt more acutely than in the law library. Library staff have been tasked to wear multiple hats and take on more responsibility, whilst simultaneously being expected to do more with less. There is growing pressure to meet new demands or face being rendered redundant. In chapter 2, Kara Buzga and Tunisia Johnson – paralegal manager and legal information administrator at Mayer Brown LLP, respectively – make the case that it is the library’s ability to collaborate that will guarantee its future. Employing their knowledge and expertise, they offer guidance to those who want to move from siloed working practices to a more synergic approach in order to continue delivering excellent service to both internal and external clients.

In these times of change, it is essential to revolutionize the library’s ways of working; however, it is not always easy to be the pioneer. Difficult choices and unanticipated challenges are all part of the processes of transformation and innovation. To gain insight into potential pitfalls

would be invaluable for many looking to trigger the evolution of their own library department; however, this kind of intelligence is not always readily available. Fortunately, in chapter 3, Patrick DiDomenico – chief knowledge officer at Ogletree Deakins – supplies an exclusive insight into the absorption of his firm’s library functions into the knowledge management department, addressing the impetus for the change, its execution, what went well, and what went wrong.

It is well established that research is essential to the daily operations of a large law firm. With the right answer sets, firms can build business with new clients and serve existing clients efficiently, increasing revenue. Thousands of questions and answers fly across a large law firm like a daily network of data and unstructured knowledge, seeking organization and application. In chapter 4, Scott D Bailey – global director of research services at Squire Patton Boggs – proposes that, with the right people, processes, and tools, law firm libraries can move from learning about the firm in a supporting role to preparing and leading actionable business processes in advance. Partnering with the multiple practice relationships and business development leaders to act on these insights will affix the law firm library in a permanent and valued place in the law firm business model of tomorrow.

There is a general consensus that law students, upon graduation, are not prepared to engage in the modern practice of law. This encompasses both students’ technological preparedness as well as understanding of the business of legal practice. Lack of exposure to these concepts during law school can lead to a delay in meaningful contributions by new associates and fed-up clients. The response to this problem – or even acknowledging it as a problem at all – has varied widely between and within law schools. In addition to reviewing some of the general trends and individual approaches taken by law schools around the country, chapter 5 by Jocelyn K Sagherian – reference librarian at the Fordham Law School Library – discusses ways law in which firm librarians can assist in this new approach to legal education with the ultimate goal of improving the bottom line of the law firm.

For international law firms, with operations around the world, law libraries have arguably run at a 24/7 pace for at least a decade. But even mid-size law libraries now see attorneys tapping research and making requests around-the-clock. A mix of technology and collaboration – both inside and outside the library – offers a path forward. What’s the right formula for meeting an increasingly complex mix of requests? What are law librarians doing now to keep up, and what thoughts and advice do

firms have for librarians still coming to grips with how to truly be open around the clock? In chapter 6, Jim Haggerty – vice president of LAC Group – utilizes his expertise in providing solutions to achieve unparalleled research and competitive intelligence to offer the potential answer to these pressing questions.

In recent years, executive directors and chief financial officers have started to inquire with increasing frequency as to the feasibility of outsourcing library staff. Consultants and outsourcing solutions are both disrupting the legal information market; for instance, it is estimated that consultants are engaged at roughly 55 percent of the largest law firms in the legal information space. Whenever a new executive arrives at a firm, they want to make their mark, and in today's market will often utilize consultants. Legal information, when properly managed, has a clearly demonstrable value or return on investment; however, this is often lost on law firm executives. In chapter 7, Michael Feit, president of Feit Consulting, employs his experience and expertise as a consultant to lay out what steps law firm legal information managers should take to ultimately withstand executive scrutiny and best illustrate value.

In chapter 8, Cynthia Brown – director of research services, Littler Mendelson PC – and Jill L Kilgore – research librarian, Littler Mendelson PC – explore how a client problem found its solution in a library. In a novel business development approach – which ultimately helped capture the work of in-house counsel – the library drew on established information-gathering capabilities to provide data visualizations and enhance attorney services. The application of these data analytics helped identify inefficiencies in a client's human resource functions and the implementation of solutions. The case study in this chapter highlights these hidden opportunities made possible by established library practices, and offers insight on how to gain access to potential new projects through interdepartmental leadership.

With the cost of office space increasing in most cities, the biggest financial burden on any law firm is the cost of their premises. Business teams are being squeezed for space; this often has an impact on libraries, which usually have the largest footprint of any of these teams. In chapter 9, CJ Anderson – head of information and research at Linklaters LLP, London – outlines the topics those starting to make the change from physical to mobile need to consider by using the evolution of Linklaters' information and research service. This serves to illustrate the factors that have changed the physical library and the impact these have had on CJ's team – affecting the resources that they buy and the services

they provide, their relationship with the IT teams, and the behavioral changes of the lawyers they support.

In the years ahead, software will perform legal tasks previously reserved for lawyers, paralegals, and information professionals; a great deal of the money paid by clients for those legal services will go to the architects of that software. Will this be an information oligopoly, or will the benefits be widespread? In the final chapter, Ed Walters and Sean Tate – CEO and AI sandbox product manager at Fastcase Inc., respectively – make the case that the answer to this question, in part, lies with how broadly the providers of legal services and information participate in artificial intelligence. Guidance will be offered for those information and legal professionals looking to reap the gains of the new economy and harness the potential that the broad-based renaissance in legal services brings.

About the authors

CJ Anderson is head of information and research (I&R) at Linklaters LLP in London. She qualified as a librarian in 1996 and worked as an information professional in a number of sectors (public, civil service, and pharmaceutical) before joining Linklaters in 2001 as an information advisor in a practice and then leading I&R for a global division. In her current position, CJ has developed and led a truly global team, working across offices on a regular basis. CJ became a chartered member of CILIP in 2000 and is a passionate advocate for the professional development of Linklaters' I&R teams. She believes in working smarter, not harder, with a focus on self-service desktop products and exploiting overlaps with other teams to provide streamlined information and research solutions.

Scott D Bailey is the global director of research services at Squire Patton Boggs, managing the complex international KM and R&D needs of a law firm with 46 offices in 21 countries. With thousands of internal and external clients in a top 10 “most global” firm, his team of researchers is approachable, energetic, and engaging whilst delivering a high level of experienced analysis. He recently co-authored an article for the March/April issue of the *FinTech Law Report*, entitled “Use of artificial intelligence for smart contracts and blockchains”. As a champion of success through authentic intelligence and building knowledge community, Scott works collaboratively with a variety of professionals beyond the legal industry; he believes in creativity and fostering situations where gathering up the right people and getting everyone going in the same direction leads to multiplied benefits for all stakeholders.

Cynthia Brown is the director of research services at Littler Mendelson, the world's largest employment and labor law practice representing management, where she has bridged the worlds of the library and knowledge management since 2007. Her previous experience includes working as in-house counsel for four years at a small risk management firm, as an

account manager and training consultant at LexisNexis, and running a solo library in Salt Lake City at Jones Waldo Holbrook & McDonough.

Kara Buzga has served as a paralegal manager for over two decades, with management experience on both the plaintiff and defense side. Among her experiences on the plaintiff's side, she successfully organized, managed, and implemented a document retention policy team and maintained various firm-wide litigation holds while upholding preservation requirements. Currently on the defense side, her experience includes case needs assessments and strategic management of workflow and work assignments. Her role is to be a source of innovation, intelligence, and change. Kara collaborates with matter responsible lawyers and senior associates from all practice groups, on a matter-by-matter basis, to implement matter management tools and techniques in order to ensure that matters are executed efficiently and within budget. Kara is also responsible for increasing and maximizing the utilization, efficiency, and effectiveness of her firm's paralegals.

Patrick DiDomenico is the chief knowledge officer for Ogletree, Deakins, Nash, Smoak & Stewart, PC, an international labor and employment law firm with approximately 900 attorneys in 52 offices. Patrick also serves on the firm's Technology Strategy Committee, Research and Development Council, and Innovation Summit Committee. Before his knowledge management career, he was a practicing litigation attorney for more than eight years. He is also the author of *Knowledge Management for Lawyers* (2015), published by the American Bar Association, and publishes the LawyerKM blog (www.LawyerKM.com) in his spare time. He is a Fellow in the College of Law Practice Management, a frequent speaker on KM, legal technology and legal innovation topics, and an advisor to legal technology startups.

Michael Feit has been a legal information professional for 28 years, starting at Westlaw, where he worked for over a decade. His last position as senior director, large law strategy gave Michael the insight into the motivations behind the tactics of legal information vendors. Starting Feit Consulting in 2001, Michael was one of the first consultants in the legal information space. Since then, he has educated the market on the tremendous disparities that exist in legal information product pricing arrangements from firm to firm. Since inception, Feit Consulting has worked with over 75 law firms, assisting each in better understanding

best practices in legal information services, while providing thought leadership on industry products, practices, and trends. Feit Consulting clients have benefited from increased efficiencies and savings of more than \$150 million.

Jim Haggerty has 21 years of experience with the legal industry and information services. He joined LAC Group, a provider of information and knowledge management solutions, from LexisNexis, where he was vice president for the Am Law 100 and large corporate legal departments. At LAC Group, Haggerty oversees the expansion of the company's offerings for on-site and virtual librarians at law firms, corporations and any organization wanting unparalleled research and competitive intelligence. Haggerty received his bachelor's degree from the State University of New York.

Tunisia Johnson is a legal information administrator at Mayer Brown LLP, New York office. She has worked in the library field for 20 years in a variety of roles, ranging from library filer to library assistant. Later in her career she returned to education to receive her MLS degree; upon her completion of the program, she was then promoted to her current position, in which she manages the library department. Tunisia is responsible for paring down duplicate print materials, focusing on digital content, organizing training programs by vendors for specific practice areas, negotiating vendor contracts, and providing legal research assistance. These tasks require her collaboration with several departments within the firm and across other offices. Tunisia is very knowledgeable of the many legal research resources available, with her skills and expertise earning the respect of her firm's attorneys and paralegals, alongside her library colleagues in various offices.

Monice M Kaczorowski, MLS is principal of AGOG Consulting, where she leads client engagements and develops resources that are focused on process improvement and library modernization. In collaboration with her client, Feit Consulting, she recently co-authored their most recent white paper release, *Beyond Virtualization: Transforming The Law Library* – a comprehensive resource on the modern law library. As a former chief knowledge officer, she has been a proponent of law firm KM as a way to improve attorney workflow and foster efficiencies within the practice of law. Monice has a keen sense for the large picture while understanding the micro-nuances of legal information management.

Jill L Kilgore is currently a research librarian at Littler Mendelson, PC. She received her MLS from Emporia State University. Prior to her career as a law librarian, she studied art history and studio art at the University of Kansas. Her areas of interest include emerging technologies, digital scholarship, visual resource management, and social justice.

Jocelyn K Sagherian works with the Maloney Law Library at the Fordham University School of Law, providing reference assistance to students and faculty. At Fordham, she has taught courses on legal practice technology and basic legal research, as well as classes on competitive intelligence, eDiscovery, and patent and trademark legal research. Prior to working with Fordham, Jocelyn was the manager of library services at Gardere Wynne Sewell LLP (now Foley Gardere). She also worked as an account executive and distance learning specialist with LexisNexis and as an associate at Schulte Roth & Zabel LLP. Jocelyn received her BA from the University of Florida, her JD/MPA from the George Washington University, and her MLS from the University of Buffalo.

Sean Tate is the AI Sandbox Product Manager at Fastcase, Inc, where he works to democratize the law by creating a read-write technological environment allowing for the truly unique analysis of legal data with artificial intelligence tools. Sean has been a member of the Fastcase team since 2014, working on projects such as daily automation of Statutes and Acts and Fastcase's TopForm bankruptcy filing software. Sean has a Bachelor of Arts from Ohio Wesleyan University.

Ed Walters is the CEO of Fastcase, a legal publishing company based in Washington DC. Before founding Fastcase, Ed worked at Covington & Burling, in Washington DC and Brussels, where his practice focused on corporate advisory work for software companies and sports leagues, and intellectual property litigation. Ed earned an AB from Georgetown University and a JD from the University of Chicago. He is an adjunct professor at the Georgetown University Law Center and at Cornell Tech, where he teaches The Law of Robots, a class about the frontiers of law and technology.