AALL 2011 Faculty Services Round Table

July 25, 2011, 12 PM to 1 PM

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Topic: WestLawNext and Lexis Advance

Question: Faculty

- At some institutions faculty are not interested in learning the new WestlawNext or Lexis Advance unless they are being pushed by their research assistants or other students who are using it.
    - The “classic” Westlaw and LexisNexis are what the faculty is most comfortable with.
    - Some faculty does not want to learn the new products, they just want their request filled – get me what I need.
- Some institutions have provided lunch or other food venues to entice faculty to come and learn the new products/enhancements; others have the “reps” come in and train the faculty.
- Some institutions had poor response in getting faculty to show up to training sessions.
- There was a distinction between faculty research assistants and library hired research students and how the focus and research needs are different for these 2 groups.
- Library liaisons can work with faculty RA’s to individualize their training.

Question: Students

- Start teaching with 1L’s since they do not know the differences and are open to the options.
    - However, four systems are a lot to learn (Westlaw classic, WestlawNext, LexisNexis classic, Lexis Advance).
    - The students find what they prefer.
- 2L’s and 3L’s -- it is up to them to come to learning or training sessions.
- Having training sessions in the fall and spring seems to work for most.
- Librarians try to watch classes and get faculty input for needs of (e.g., case law, secondary sources, and legal writing research).
    - It is not always easy.
    - From a survey, students are coming around to using the new products, but filtering and checking sources is important as is reminding the students to check their results.

Question: Administrative Assistants

- Because of supervisory issues, librarians should go through the dean or other administrators to determine if administrative assistants should be using TWEN (scanning and loading course materials).
    - These issues seem to be different from institution to institution.
- This may be the case with adjuncts, also; they can be shown how to load course materials by the librarians or by the administrative assistants.
- It may have difficult for assistants to use TWEN or Casemap in some institutions.
    - They may be required to use programs like Elluminate which is a blackboard product.

Question: The Products

- Some commented that the “Classic” versions are better at finding a specific case or cite than the new “Google” or “Microsoft” product.
- WestNext and Lexis Advance sometimes lead users to frustration with their results.
    - You can find many things, but pinpointing and verifying them is what the “classic” version does best.
    - Like most subscription databases, they are a better tool than free online
        - (Example Wikipedia is a starting point, but you need to verify the facts).

- A note about Boolean searching: the connectors work differently and the “quotes” work in the advanced level but not in the top level (it ignores the quotes).
    - Lack of content is a problem in the new products.
- The librarian module must be like the student module.
    - Instructors need to see what the students are seeing.
    - This is a different case for the firms where it makes sense to have different modules for the lawyers and the librarians.
- Dual passwords are very problematic and frustrating for everyone involved.
- There were other comments that were off topic--these were left out.

Topic: When and how can we draw the line when faculty ask for too much? Is there a ‘too much’?

- Our lead question generated many variations on the same theme: ‘No’ isn’t often said, and we often repackage the request into what we *can* do, instead of outlining what we can’t.
- Some attendees said:
    - “Avoid kneejerk reaction of ‘no,’ because we could try to work out a solution.”
    - “No still happens, but emphasize what you CAN do in the same breath.”

Question: Are there clear ‘no’s for certain types of requests?

- Some attendees said that policies stated they couldn’t provide certain types of support.
    - For example, not being allowed to upload all SSRN articles for a faculty member.
    - Also, not going near the ‘unauthorized practice of law’ slippery slope.

Question: How do you set faculty expectations for support? Internal policy among the librarians (informal ‘office culture’) or published policy?

- E.g.: faculty services handbooks, faculty RA training, and faculty support may all be used to redirect/repackage a request and establish expectations.
    - The handbook should be: positive, a directional tool, open-ended, something that establishes what we do.
- E.g.: One attendee holds an annual lecture for RAs to ensure some level of training/expertise for faculty requests.
    - In keeping with the RA training theme, many RA’s MUST see a librarian before beginning research for a faculty member.

Question: How do you manage the broad request from a faculty member?

- One attendee cleverly coined these requests as ‘iceberg questions.’ Broad requests are dangerous in respect to time management, as they may expand beyond original parameters.
- One attendee asked: What if you’re put on the spot with such a question?
    - Suggested solution: Deflect! Suggest that you’ll look at it, come up with a game plan, and then contact the faculty member with the plan.
        - This helps with dividing work, managing expectations, organizing research workflows, identifying primary information, and properly training an RA to take over.

Question: Is it safe to ask: ‘when do you need this by?’

- Establishing a workflow/timeline can help manage expectations

- Questions in the initial stage can lead to further questions that may help narrow the request.
- Time limits determine the depth of request (i.e., if the faculty member wants it right away, you can only do so much.)
- Alternative: propose a deadline with action steps to keep faculty member informed.

Question: What about faculty members from other departments?

- Redirect to department's library liaison
- Minimize assistance, particularly in respect to acquisitions or staff-intensive requests
- Negotiate the boundaries with non-law librarians to assure coverage.

Topic: How proactive can we be (should we be) in sending information/tips/tricks to the faculty, especially for non-legal resources?

- Most just keep sending faculty updates unless they say to stop. The theory is they can just delete it if they want.
- One librarian sends a letter every fall to all faculty outlining the services the library provides including available databases and who to contact in the library. She might follow up with a phone call if the faculty never responds. She makes a special effort for new faculty.

Question: Has anyone run into problems with updating faculty?

- The consensus was that silence from faculty is typical.

Question: How far can you go in being proactive?

- Meet with faculty, ask what their researching.
- Forward them articles and suggest that they share with their students.
- Have a coordinator for divvying up what gets sent to faculty.
    - Review course lists for adjuncts so you know who they are and what they're teaching.
    - Try to get an idea of what they do and how they teach so that you're prepared when they do need help.
- Find out if the course is a paper course that might require more attention from the library.
    - If so, find out if the professor wants students to meet with librarians as part of the writing process.
- One institution creates a personalized webpage for faculty that shows current articles and news in that professor's area.
    - They found that the feedback was pretty positive.
    - Their IT guy came up with his own program for this.
    - Two RAs do the bulk of the data and input.
    - The faculty tells the library what they want and then the library figures out how to present the information.
    - The RAs send the completed product to a librarian for approval before sending to faculty.
    - Currently have 10 professors participating and expect to be at full capacity by September or October.
    - They have a little less than 80 faculty total and it takes about 20 hrs of work from the RAs a week.
    - There is some overlap between professors, which makes things easier.

- Many librarians found that they do heavy non-legal research for faculty (they have RAs that do legal research).
- One librarian makes sure she shows faculty how she did it so they can replicate it next time. This allows the independent faculty to replicate the research process the next time.
- Another librarian will write up a quick answer and a long answer for faculty and the faculty can select which one he or she wants to use.
- All recognized that boundaries with faculty can be difficult, especially with current awareness as it takes a huge chunk of time.
    - Some librarians attend faculty lunches to get an idea of the research they are doing.
    - Many take quick moments in passing to check in with faculty.
- Try to stay current with who the RAs are and the type of research they are doing for faculty.
    - Students are often reluctant to approach librarians for assistance.
- Most folks use liaison programs.
- Many found that it was hard to match up the collection development aspect with the liaison for faculty.
- Many do a table of contents service for non-law journals.
    - One library creates RSS feeds for faculty in ProQuest and JSTOR that pushes the content out directly to faculty.
    - They meet with the faculty first and then tailor the research from there.
- One librarian tries to monitor information, what's out there, so that when a professor asks for something, it will be easier to recall later.
    - Or, just send it to them when you see it before they ask for it a month later.
- Many thought that creating a subject list (wiki) of blogs that should be consulted for particular subjects would be helpful.
    - It could also include journals, other current awareness tools, and big names to watch.
    - If someone has already done the research to find out what needs to be consulted to stay current on particular topics, they could contribute it to a wiki that others could consult.
        - For instance, if you're doing sociological research, these are the top 5 databases, top current awareness tools, and top journals in that area of research.
    - You already have the information because you're doing the research for your faculty. You would just need to add it to a wiki.
- One library uses Netvibes to monitor what they send to faculty.
    - If you are sure to include the professor's name, it makes it easier to pull up later.
    - They use Netvibes for all reference questions.
- There is a point that is too far.
    - We have to recognize that we are not their RAs.
        - There are exceptions when their RA is unavailable. But, we have to mention when something is more appropriate for an RA ("I'd be happy to meet with your RA to show him or her how to do this").
    - One library hired floating RAs to provide research assistance when a faculty RA is unavailable or the faculty hasn't hired an RA.
- Some use Dropbox to send documents to faculty, particularly with the limited size for attachments in most email.
    - Plus, Dropbox has a record of deleted documents.

- There seems to be a lot of miscommunication on what types of research are time-consuming and/or are difficult (faculty think it will be quick and easy and it's really not).
    - For instance, the faculty needs someone to take a look at footnotes.
    - One librarian noted that whenever they ask for "everything" on something - that is the first clue as to how long it will take.

Topic: Research assistants - How can we work with them effectively? What issues/problems (training, communication, etc.) have you encountered, and how do you handle?

Question: What is the current structure of your work with RAs?

- These are some examples of how different institutions work with research assistants:
    - One library has 3 GRAs in the library, 8 hours/week, half tuition scholarship and $1000 stipend each semester – one supervisor to supervise them
    - One library hires 7-10 RAs each year, about 120 total hours per week. (10-15 hours each.)
        - Act as a go-between. A little prep work and then assign to RA.
        - Give deadline and then review work before sending back.
        - Some professors hire their own RAs.
            - When they don't, that's where the library comes in
    - One library offers ½ day training session for professor RAs.
        - Also 5-6 RAs who work the reference desk 8-5 M-Sa, staff the desk in the evenings.
            - There is a dedicated email, and the 2Ls and 3Ls do sometimes communicate directly with the faculty.
            - They have a reference tracking system so all can see ongoing projects, using for 8 years now.
            - Training is ongoing – monthly training to remind them of things, often there to monitor.
            - Lucky with good RAs.
            - Circulation and TS use undergrads only, so reference is the place where law students can work.
    - One library notes ups and downs with RAs.
        - 20 hours of RA help in the library per week.
        - She supervises most of the work.
        - Plan to hire a separate RA for the FCIL librarian
    - One library doesn't trend to train RAs.
        - Talk about reaching out.
        - They have 6 fellows that work 20 hours per week each.
    - One library offers training for faculty RAs, not popular.
        - Strong liaison program.
        - 2-3 library RAs who work 10-15 per week.
        - Librarians hand off projects they can handle, whoever is the liaison to that professor.
    - One library offers to train faculty RAs, not popular.

        - Lib employs 2-6 RAs, work about 20 hours/week, filtered through faculty liaison match.
        - Sometimes match RAs with librarians, sometimes faculty services librarian manages
    - One library has only 2-3 RAs in the library each year.
        - A lot of faculty members hire multiple RAs.
        - Librarians offer training, and only train them if the faculty members tell them to go.
            - Even if they are told to go, problem is that RAs are out.
    - One library offers RA training for faculty, similar in solicitation.
        - They do not current hire RAs in the library.
            - Would like to, to help the students learn more.
            - Wondering, have there been issues with funding RAs in the library?
                - A: need to sell the idea to administration and faculty, tell them about the benefits of hiring students to extend ref hours, increase research dedication.
    - One library offers one-on-one training sessions for faculty RAs.
        - No general training session at this time because not popular, so focus on specific projects.
        - Library employs two research specialists, lawyers who are earning library degree, 20 hours per week.
        - Last year we employed two law students, but research assistants are 5x as effective.
    - One library notes that faculty members employ their own RAs.
    - One library uses a two semester cap on working in the library. Sometimes, they refer their RAs on to professor
    - One library has librarians supervise RAs through liaison program.
        - So RAs work directly for faculty.
        - Sometimes librarians do research themselves, but definitely work with RAs on specific project.
- Agreement around the table – tell the professors that the training is valuable, so they will force their RAs to come to the training.

Question: What qualities do you look for in RAs?

- Other graduate experience besides current JD program (another Master's, an MBA), anything that shows previous research experience
- Editing experience, have worked with professors before
- Existing knowledge of databases such as JSTOR, Academic Search Premier, etc.
- Depends on reference (good with people?) or research focus (detail oriented?)
- Familiarity with research strategies – can ask them, "What would you do, how would you start project X?" during interview
- Journal, moot court experience – they have conducted original research

Question: What do your RAs do besides research?

- Proofreading
- Special library project like updating microfiche holding
- Other ongoing projects like tracking faculty citations

- Track what faculty members are citing in their work, and check whether our collection reflects what they use.

Question: How do you maintain consistent quality even if you have weak RA?

- Constant monitoring
- More important, set them up with a research plan
- Some use a worksheet that shows what they checked, how they searched, etc.
- RAs only work when their supervisor is there.
- Others don't always overlap with faculty services librarian is there.
    - This causes some trouble with setting up meetings.
- Can be problematic if your program is set up for a long-term contract.
    - Example, 2-year commitment means you might need to get creative on how to use duds when it comes to research – move only to reference.
        - Idea: implement evaluations at 3 and 6 month mark, with warning that they are not necessarily retained if the work is falling short
        - Several agree the warning of semester-by-semester is key
- Check in with RA more frequently between deadlines. Hopefully they start to learn what is expected of them.
- Idea: perhaps ALL-SIS should come up with a list of things we look for in RAs and how to choose a good one, how to supervise them.
    - This could extend as a service to faculty, by providing them with a checklist of what to look for in an RA.

Question: Do you follow-up with faculty RAs who you have trained to see how they are doing?

- Maybe email the RA 1-2 weeks later to see how they are doing.
    - RAs tend not to ask even if they are struggling, perhaps because they think they should be able to do it
- RA turnover can be an issue – they quit and you don't know.

Question: How do you tell RAs that you are not there to do their research? That you only guide?

- Sometimes it might be appropriate to help them with an unfamiliar database, generate a list of articles for them to look through
- May depend on their deadline.
    - More willing to do more if they have an impossibly short deadline
- Mary Whisner, "Way, Memos" LLJ column 2003-2004.
    - Good guide for newbie RAs in packaging work.

Question: RAs sometimes ask, "Why do I need to attend this training if I had 1L legal research?"

- Tell them that many advanced databases are available and may be useful

Question: Are there technologies you use with RAs?

- Zotero
- Drop box
- Sugar sync
- Clio – legal project management tool, all online.
    - Set up request as a matter.
    - Keep track of time, store documents.
    - Really great tool.

- Open atrium – Drupl installation.
  - Good for collaborating on projects.
- Google Docs – share spreadsheets and other documents
- Share keyboard shortcuts – a lot of students don't know about helpful tools.
  - Example: shift + ctrl + K = small caps
- UW has a guide on shortcuts

Question: What is the biggest challenge?

- Need to redo work, wastes time.
  - Can be helpful to review the work with the RA after you have fixed it.
- Analysis can be great, ability to read through things is great, but their ability to follow through correctly on research steps is lacking
- Motivation is a huge challenge.
  - If an RA is good, maybe you don't check in until you are close to the deadline.
  - If not, you might check in on a daily basis.
- Can be challenging to find a good RA pool.
  - Depends partly on other job opportunities available in your city, how distracted students are.

Question: How much time do you spend holding hands, based on 40 hours of work?

- Estimate is 10 hours communicating back and forth, directing, for GRAs (receiving scholarship and stipend)

Question: Do you pigeonhole RAs once you find out they are good at something?

- Yes. Capitalizing on their individual skills
- Try to ferret this out during interviews, too – what hole might this RA fill?
- After you figure out who is a super star and who is not as skilled.
  - For sake of efficiency, need to give the super star the best projects and the most projects. Might sound unfair, but it is necessary.

Question: How do you make a general training or orientation relevant?

- Emphasize communication – the librarians are here
- Suggest that they might not use these things for professor, but could use it to write a paper or in future research as an attorney.
  - Sell it as generally helpful to their careers
- Talking to RAs with their professors in the room can be helpful

Question: Suggestions for future committee conversations

- Institutional repositories and SSRN
- Please send suggestions on to the committee

Topic: Recruiting faculty to use the library - how can we draw them in?

Question: We have a faculty liaison program, but no faculty services librarian. What does a faculty services librarian do?

- Coordinates liaisons.

    - Assigns the liaisons by volume of work so that the workload is equal across librarians, by subject specialty, and also by personality.
- Coordinates training sessions, seminars on new resources, and faculty outreach.
- Having a faculty services librarian shows that we think the faculty is important.
- There is an ALL-SIS discussion about different types of models for faculty services/liaison programs.
- Chairs a committee meeting re: what the faculty is working on.
- Without a faculty services position, it's more diffuse. Everyone is responsible for reaching out to their own faculty.
    - The faculty services librarian can take the more demanding faculty, since faculty work takes up more of their job description.
- One university is moving away from the liaison program and directing all faculty requests through the faculty services librarian because they're concerned with uniformity of services.
    - Some librarians are better than others, or will go farther and do more than others.
        - The faculty services librarian can keep an eye on that, and also make sure that policies are followed so some faculty members don't get preferential treatment or better service.
- What are the pros of a liaison program/what do liaisons do?
    - Encourages reaching out to faculty members about new services, products, databases, etc. (though this could be the role of the faculty services librarian)
    - One university makes the librarians do in-person meetings with their faculty.
        - They have a checklist of what questions should be asked (what are you working on, what are you teaching, etc.) and they've created a database
    - Sometimes the faculty member doesn't respond, or doesn't really answer the questions, and that's ok. The point is to try.
    - Liaisons can be proactive (PR for the library), the faculty services librarian can be reactive (answering specific requests)
    - One person can't do everything. It's hard to develop personal relationships with the entire faculty.
    - The faculty knows who to call. There's no guessing, because regardless of what the issue or question is, they can contact their liaison and the liaison will funnel it to the proper person.
    - It's easier to keep statistics and justify what we do.
    - Go through the curriculum and contact the professors in your subject specialty. Focus on the seminar classes.
- Work with the Research Assistants. Speaking of RAs, what do your RAs do?
    - RAs can be problematic because some projects aren't RA-appropriate, and even if they are, sometimes the timing isn't right (i.e.: the semester is almost over).
    - One university has a reference RA at the desk with a librarian if they're not working on a project.
    - They're really great if you have a library school and have access to library students with JDs!
- Some professors don't want to hire RAs, and would rather work with a librarian.
    - You have to say no if the project is too big.
    - One university has a written policy that librarians won't do projects that take more than 20 hours.
    - New/younger faculty members tend to dump big projects on librarians.

        - (ex: empirical data sets, 50 state surveys)
    - There’s an issue with faculty members who are doing research in areas they don’t fully understand and/or they don’t know sources.
    - Also a lot of “find proof for this statement that I made”
    - Librarians will not do all of your research for you.
    - If the faculty member doesn’t know what’s appropriate, we have to tell them.
    - The legal research instruction deficiency is pretty obvious with some of the newer faculty. Sometimes their research process is bad.
- One university recently established a faculty liaison program and now it’s being used by the law school when recruiting new faculty…check out this fabulous library service!

Question: What types of requests do you get from the faculty?

- Depends on their relationship with the liaison.
- Not many substantive, lots of document delivery.
- Quite a few that takes around 1-2 hours to complete.
    - Anything larger is given to an RA.
- It really depends on the school.
- One university calls their program “LibRA”…they make it very obvious if the RA is doing the work instead of a librarian.
- Many interdisciplinary questions. The professors need help with non-law sources.

Topic: Use/engage the faculty

- The best way to raise the profile of the library is to be in good with the faculty.
- Let the faculty know if you have to cut services due to budget constraints. They may advocate for you.
- Offer to do guest lectures in their classes.
    - Most faculty members aren’t interested and/or don’t want to give up the class time.
    - Propose a 1 credit hour add-on research class tied to a substantive class that has difficult/different research issues (ex: securities)
    - Create a LibGuide for every seminar, and then ask the faculty member to add a link on the course webpage.
        - Or create LibGuides on request.
    - Most success with seminar classes that require papers.
    - Once you get into a class, if the faculty member is happy, word spreads.
    - Ask the faculty member to put a link/bio/info about the library liaison on the course webpage.

Question: Have you had any success drawing faculty into the library? If so, what did you do?

- Lunch presentations: new resources, how to access articles/databases remotely, catalog links, how to access interdisciplinary materials via the main library.
    - Not huge turnout, but the faculty that attend does have more contact/follow-ups with their liaisons.
- Include the faculty in collection development. Invite them to actually come and look at the relevant section of shelf, ask them what’s missing from the collection in their subject specialty.
    - It’s important to us, for budgetary reasons, to get the best sources”
- Put together a bibliography of faculty publications.

    - One university put together a 200 slide presentation that featured faculty publications, and then held a wine & cheese reception. It was well attended and the faculty were surprised that the library cared about their scholarship.
- Talk to faculty members that have seminar classes, particularly with a paper requirement. Ask to come in and introduce yourself in the first few weeks of class.
    - This is an alternative to guest lectures.
    - Tell the students that you're available to help them refine their paper topic and help them with research.
    - Alternatively, ask the professor to mention you and your availability.
    - Prepare a short bibliography on the seminar topic, if it's reasonably narrow.
- Host book talks for faculty members to come talk about a new book they wrote.
- Host student colloquia, like the faculty talks, but include the students.
    - The students can learn what the faculty is working on.
    - Great networking opportunity for the students.
    - Timing is tricky, look at class schedules and choose a time when students are free, but likely to be on campus.
    - Pick popular faculty members; try to make it interesting and fun.
- Join faculty committees if you can, go to the faculty lunches.
- Be proactive. If you see a relevant article, send it to the faculty member.
- Get invited to faculty parties.

Topic: Wrapping up and various asides.

- Budgets/Justifying your existence
    - Students/RAs don't do reference.
    - Faculty relationships are essential, reference stats aren't going to do it.
    - Teaching.
- Interlibrary Loan
    - Track it, make sure faculty is getting what they need.
    - Getting faculty to return the book can be difficult.
        - Make sure they know that if they lose it, the library has to pay for it. Perhaps threaten to take the money out of their funds.
- When a faculty member leaves, contact the librarian at the new university and give them background info.
    - (Ex: what BNA alerts did the faculty have set up?)
- WestlawNext
    - Training from reps?
    - Faculty just kind of realizes it's there, and then asks for help.
    - When a faculty member has a question about a source, do you train them or just do it yourself?
    - Really depends on the faculty member.