



DOING MORE WITH MORE: *You Can't Shrink Your Way to Success*

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INTRODUCTION

Special librarians achieve sustainability by understanding *that evolving end user requirements demand new services, innovative solutions, information discovery on-the-go and the most effective channels for knowledge exchange*—even (perhaps especially) in these days of diminishing resources.

Special Librarians are continually being asked to deliver more...

- More Content
- More Access
- More Services
- More Results

For more reasons...

The imperative to do more exists, even in the face of...

- Shrinking staff size
- Smaller budgets
- Less physical space
- Diminishing priority with overworked IT staff
- Less influence as valued organizational leaders

Here's what we know: you cannot shrink your way to success. Special Librarians can only do more, *with* more.

Building on prior years' SLA Hot Topics sessions, "Adapt, Act and Thrive" and "Building the Resilient Library", at this year's Annual Meeting we sponsored the third in our discussion series on the sustainable library: "Doing More with More". This session focused on the success stories of information professionals who are building their libraries' influence with an orientation towards abundance, not scarcity.

Attendees heard actionable advice from peers who don't shrink their way to success but instead fill needs via *more powerful technology tools, more access and discovery options*, and by doing what it takes to exert *more influence* on organizational knowledge exchange.

This whitepaper presents information shared during the event, combined with additional valuable insights gained from panelist interviews conducted in preparation for the discussion.

PRESENTERS

Participants in this year's session, "Doing More with More" shared success stories focused on:

- Building strategy around results, not cost
- Leveraging technology to do more than ever
- Creating productive change

Our speakers were:

- **Kevyn Barnes** – *Webmaster, Center for Transportation Research*
- **Katrina Perez** – *Resource Management Librarian, Drinker Biddle & Reath*
- **Sara Thomas** – *Director of Research & Information Services, Miles & Stockbridge*
- **Marcus Liban** – *Product Manager and Knowledge Management Expert*

Phillip Green (Lucidea's COO) facilitated the discussion. Each speaker gave in depth comments and practical advice based on their own experiences delivering more in a time of shrinking budgets and fewer resources, proving that it is possible to deliver even more than you imagine, for a lower investment than you expect.

INSIGHTS AND LESSONS LEARNED

Each of our speakers addressed specific ways in which they go beyond traditional library offerings to deliver more content, more access, more services and more results—for more reasons. When we say "more reasons," we refer to organizational strategic imperatives, such as reputation building and brand reinforcement, support for a mobile and global workforce, a strong and dynamic web presence (including social media), business development, and yes, cost effectiveness.

THE CENTER FOR TRANSPORTATION RESEARCH (CTR) _____

CTR is a multidisciplinary and multimodal research institute at the University of Texas at Austin. It is recognized as one of the leading university-based transportation research centers in the world, with researchers, faculty members, and students working together to promote cutting-edge developments in transportation science and technology.

Keryn Barnes is CTR's Webmaster, and during the session she spoke about the many ways in which the CTR library supports the Texas Department of Transportation (TXDOT) in its important strategic goal of providing online public access to the significant volume of transportation research and resources they produce. Specifically, TXDOT developed a strategy of showcasing their best-in-class research to the public and to other universities, research units and libraries via the web. To support that goal, CTR knew they had to offer cutting edge technology; the need for sophisticated and powerful online access resulted in a public catalog that is one of the most advanced in the transportation community.

Sometimes More is Just the Beginning

Per Ms. Barnes, when CTR first took on the management of TXDOT's print collection, they knew that TXDOT wanted to increase transparency regarding its resources, so CTR put an online catalog in place, and was in fact one of the first Department of Transportation affiliated libraries to start digitizing. As an early adopter of web technologies, they were using social media and indexing their materials on Google, and they felt a lot of support for their initiatives—even though staffing diminished (as it did for other departments). However, two years into this program, a very senior person saw some books in the library and asked "Aren't you online? Why do we need a library? Everything is online." This pointed out the need—not only for marketing what they were already providing—but for a user survey and subsequent changes to their content and services.

Give Users What They Want and What They Need

User feedback indicated that people wanted "Google-type searching" and "Amazon-like functionality" through the CTR website, which simply wasn't possible with their existing ILS. CTR library staff knew they didn't want to contract out a project to upgrade their system, and they needed tools they could leverage themselves without depending on IT, so they licensed Presto. With it, they offer a website that is modern looking, with many more features that appeal to and engage TXDOT and other users.

CTR's Library site now integrates seamlessly with the organization's website, <https://ctr.utexas.edu>, as well as with TXDOT's website <https://www.txdot.gov/> which policy makers and legislative staff think is fantastic. (The previous Library site's 60% bounce rate is a thing of the past, having gone down significantly.) Highlights of the site include a "Hot Topics" section which drives a lot of traffic and leads to the serendipitous discovery of relevant content, RSS feeds which push content to user desktops, and federated search across all CTR and TXDOT resources. The CTR Library offers canned searches via Google custom search, which is not only free, but is a huge time saver for all users and staff. The original objective for Google custom search was to provide filtered access to all the Department of Transportation websites around the country so that researchers interested in specific topics are dropped off at the exact content they need. The second use for the Google custom search engine is to provide filtered full text access to research produced by other Texas universities working in the transportation sector. These searches were set up by the CTR librarians, to provide more access and deliver more content, at zero extra cost.

Another significant achievement is a research projects database that Ms. Barnes created with Presto. This database is the answer to a problem people had been complaining about for years: a research project can continue for 2-3 years before there is a deliverable, generating valuable materials in the process—yet there was no way to know about or access it. CTR's database of work in process connects users with ongoing research even before anything is published.

Finally, in keeping with the trend toward image-based information delivery, the research projects database has a map interface. TXDOT's IT staff works with CTR content and the database back end to link research content with places on the map. Simply click on the map, and link back to CTR's catalog—no searching required. This is a great example of working with existing content and existing tools to deliver more access and user-based services at no extra cost.

DRINKER BIDDLE & REATH LLP

Drinker Biddle is a national law firm, with 620 lawyers in 12 offices, serving clients in matters ranging from billion-dollar deals to complex class actions, across a broad spectrum of industries, with a 160-plus year history is marked by service and innovation. Their lawyers routinely collaborate across offices and practice groups to best serve clients.

All Access, All the Time

Per Resource Management Librarian Katrina Perez, for many years the Drinker Biddle library catalog was purely for books. As space for print decreased, they began to add links to the electronic versions of their resources, whether through government websites, or via third party content aggregators. This was the beginning of providing one-stop-shopping for attorneys through the OPAC. They have now cataloged all their digital resources, including online databases and the content within, delivering users to the exact information required.

Reducing print in no way meant reducing content. In addition to other electronic resources, they now offer eBooks, which are especially useful and relevant for office copies. With 12 offices, distributing hard copies of these materials is time consuming and inefficient. Now, attorneys who need the content can access the eBooks, check them out and take them on their laptops.

The Drinker Biddle library has a strategy of providing as many points of access as possible, supporting an increasingly mobile and geographically distributed workforce. Having one central library is no longer feasible, so they are "going web, going virtual... with access via laptop, smartphone and iPad, 24/7/365."

Cultivate Smarter Users

In terms of delivering more services, the Drinker Biddle library provides in-depth client intelligence. For example, they support the firm's managing partner in his ongoing effort to visit all clients. Within the last couple of years, the library has provided over 100 thorough client profiles, conveying the breadth and relevance of their skills and services.

The team also offers "tips and tricks" on the library portal page and conducts in-depth training sessions for attorneys wanting to do their own complex research. And in the spirit of "if you can't beat them, join them," they offer a *Google for Lawyers* class, taking ownership and showing attorneys the best way to utilize the search engine.

More Around the Edges

Per Ms. Perez, they leverage an electronic resource management tool to track online usage, which not only gives information on which resources are valued and which are not, but also keeps track of user names and passwords—making it easy for library staff to respond to panicked requests for logon credentials.

In addition to building a strong and productive partnership with the Marketing and Business Development department, library staff often beta test new products and applications for the IT department—even those not library related. This helps to build a perception of the library as not just asking for resources, but offering them.

MILES & STOCKBRIDGE

Miles & Stockbridge is a mid-Atlantic law firm with over 460 employees, including more than 225 lawyers working in 7 offices. The firm's lawyers possess deep practice experience and also provide an extraordinary focus on the industries in which their clients do business, requiring not only legal research support, but competitive intelligence capabilities as well.

With a collection of 10,000 volumes, multiple branches to support and a strategy that prioritizes conversion of a primarily print collection to digital formats, Director of Research and Information Services Sara Thomas and her team have a mandate to deliver content and services to multiple branches; improve access to the firm's full portfolio of knowledge assets (both print and digital); measure usage and performance, and market the department.

The Virtual Library

Miles & Stockbridge's library staff managed a print collection for multiple offices efficiently for many years. However, the firm's requirements and aspirations for information delivery and management have evolved significantly. The Information Center is now less of a destination and more of a virtual presence. Per Ms. Thomas, it was her goal to "revolutionize" the library, and approach it from a strategy of being proactive rather than reactive.

Delivering More for Less

As an important element of her mandate to increase content, Ms. Thomas offers practice group subscription reviews, for which she prepares an exhaustive list of products, resources and materials that each practice group owns. She meets with practice leaders to analyze their content portfolio together. It starts out as a cost reduction exercise but actually identifies her as a strategist who works in partnership with firm leaders. Often, content gaps are identified along with redundant materials, and funds are reallocated. By moving users online, via prepackaged practice centers, for example, Ms. Thomas reduces costs but gets more content. This gives users across the firm even more access than before, for less than they expect. The Library portal serves as a one-stop-shopping spot for electronic resources, allowing attorneys to link out to IP authenticated services. They no longer need to remember user names and passwords, and library staff get fewer calls for logon credentials.

Traditionally, legal administrative staff and secretaries don't have access to research materials. However, the Miles & Stockbridge library gives them access to user-friendly databases, which frees up both attorneys and research staff to work on "more meaningful projects."

Connect with Revenue

By building a strong reference team anchored by accredited librarians, Ms. Thomas has seen a 200% increase in research requests, and they go well beyond traditional services. One of the first relationships she cultivated was with Business Development and Marketing, which is traditionally siloed off from the Library. The Marketing Department teaches attorneys how to talk to clients, and when partnered with the strong research skills resident in the library, this resulted in a competitive intelligence program that is very much in demand.

There are always 5-10 competitive intelligence research requests in the queue and the library's deliverables are full reports, branded with the firm name and the library's name, along with the requester's and researcher's name. Attorneys know they came from the library, and when the reports are shared with clients, they know that they are getting value-added expert research as part of the client relationship.

Supporting business development ensures that the library is seen not simply as a department spending money, but as helping to increase revenue. When library leaders build relationship with other groups that are attached to dollars in the door, the equation changes completely. When cost cutting looms, the answer becomes, "if we do that, we can do less of this—which will cause revenue to decrease." It's essential to connect to strategic imperatives that are driving revenue.

In terms of additional new services, the M&S reference team learned to do new types of research while developing the CI program. Social media research is a growing part of their portfolio, for their litigators, for the product liability department, and to search out expert witnesses.

Long Term Relationships

Finally, per Ms. Thomas, the department's training manager gives orientations to all new hires—summer and fall associates, as well as lateral hires. “Branding early and often” solidifies the library's footprint within the firm. As attorneys grow in their careers they stay loyal to the library, and enjoy less formal mechanisms for brainstorming on research-related issues at the department's monthly “coffee talk” sessions that provide “a safe space to bounce ideas around.”

The bottom line: it's a firm mandate to cut costs, and to have a digital strategy. Per Ms. Thomas, this offers the opportunity to be a strategic partner and help with decision-making that impacts the firm at the highest level.

MARCUS LIBAN, BUSINESS INTELLIGENCE AND KM EXPERT, LUCIDEA

With experience as the founder of SVT/LawPort, and as Technology Director for leading law firms Baker & McKenzie and Littler, Mendelson, Marcus Liban advises national and multinational law firms, corporate legal departments, private companies, and government entities with emphasis on enterprise information management; operational efficiency; large-scale data aggregation/categorization/analysis; knowledge management, and business and competitive intelligence.

Mr. Liban joined the panel to represent organizations who use an ERM (electronic resource management) application to deliver more services and more results. The core value proposition of electronic resource management is ensuring that subscribed content delivers value to the organization, and to support evidence based decision making.

Bottom Line Results

The base case for an ERM is as a usage tracker and a tool to implement a cost reduction strategy. Mr. Liban offered the example of a private company with 1,500 users and 52 subscribed online content services. For five years, the standard protocol was to poll the users twice a year, consistent with the budget cycle and most content contract roll dates. Following that standard protocol yielded a standard response: “yes, we need to renew.” In the sixth year, they implemented an ERM, and were able to look at data such as who logged in, how long they stayed logged in, “active time” on the different sites, and where they went within a specific resource – essentially getting real time information as to usage of all 52 online content services. Within 60 days they saw that over 20% of supposedly “valued” resources weren't touched. With this evidence, they reduced costs and restructured a contracted 500 user block down to 300. When you leverage real statistics as opposed to anecdotal evidence, you can deliver more results in terms of bottom line cost savings.

The Right Kind of Access

The second use case involved an insurance company which used three developers to build an internal KM application. When they went live, they cut users off from the old system and subsequently experienced a revolt. Staff feedback on the new KM system indicated that the interface was poor and the search capability was inadequate, as well as other showing up other deficits. They pointed their ERM tool to the newly launched platform and could identify user behavior that helped them adapt the interface—increasing adoption by 75% within four months.

Mr. Liban also discussed the example of a financial institution with 1,200 representatives out in field offices and/or working with mobile devices. The company's risk management team curated and distributed regulatory and compliance data, which field representatives were required to read and understand, for legal reasons. They didn't have a strong sense of the data's usability for those distributed workers, so they used their electronic resource management application to look at who was reading the materials, and implemented targeted outreach to those who were not, eventually enforcing compliance based on real time evidence.

Who is Doing More the Most?

Organizations that leverage electronic resource management at a strategic level are truly doing the most to capture the full benefits of an ERM tool.

For example, a Fortune 500 company's Chief Marketing Officer implemented a competitive intelligence initiative. They configured their system to bring back items about their company in the news, specific competitors in the news, business trends and patent/trademark information. That worked well, but they still didn't seem to be covering all the areas relevant to subject matter experts. The Research Services Manager suggested that they could leverage their ERM to not only show who was accessing what, when, and with what frequency, but also to expose queries and query results. When that query data was applied to the competitive intelligence platform, it produced an award winning CI program.

Do More Than You Imagine, for Less Than You Expect

Whether your organization uses tens or hundreds of online services, whatever industry or sector you work in, and regardless of whether you're with a public or private entity, an electronic resource system is an invaluable tool. These use cases demonstrate that when you are proactive and look throughout your enterprise to find the right internal partners and opportunities, and—even with no development and no third party involvement—leverage your existing application(s) to do more, you become an invaluable part of top level strategic initiatives.

SHARED OBSERVATIONS

The second phase of the presentation included a group discussion of some key strategic elements of an orientation toward abundance rather than scarcity.

IT'S ABOUT RESULTS, NOT COSTS

Per Kevyn Barnes of CTR, indexing their materials on Google has resulted in 10-11,000 PDF downloads per month, which means that 1/3 of the library's collection is in electronic circulation at any time. TXDOT's Research Office is so impressed with CTR's library services and content that they've been promoting them at their quarterly meetings, and website use from TXDOT's IP addresses has increased a whopping 233% in one year. The previous 60% bounce rate is now down to 20% and the number of visited pages has increased by 160%—proving that people are visiting, staying and using.

Phil Green observed that it's important to refocus the conversation from costs to benefits, e.g. if something takes two days to arrive via interoffice mail versus near-instant download, that makes a very powerful case for conversion to digital resources, especially when you have geographic dispersion of staff. Library managers can find those instances, and use them as supporting anecdotes for justifying changes.

LEVERAGE TECHNOLOGY TO DO MORE THAN EVER

As shown, an electronic resource management application is a great example of technology that can be productively used way beyond its primary purpose. Per Marcus Liban, many organizations with a business need will either look to change user behavior or default to buying a new product. He makes the case that an ERM is a multipurpose tool rather like a Swiss Army Knife. It can be used for its traditional cost savings and user metrics value, but before going out and paying for something new, existing applications should be looked at with creativity. In the case of the Fortune 500 company with a competitive intelligence program, Marketing and Research were "two islands" with separate applications that serendipitously came together to refine an award winning CI program.

At the Center for Transportation Research, they leverage instant messaging, social media applications including Pinterest and Twitter, and Google's webmaster tools as well as their custom search engine. All these are free technologies and play a powerful role in the reach and influence of the CTR library.

Finally, enterprising librarians go beyond classic library technology and leverage existing tools from other departments. Per Ms. Perez, at Drinker Biddle, there are librarians in only four of the firm's eleven offices. Library staff utilize the IT Help Desk's remote assistance application to connect remotely and walk attorneys through constructing search queries and so forth directly on their desktops. They also offer training using this application to new hires in offices without library staff.

CREATE PRODUCTIVE CHANGE

At Drinker Biddle, Research Librarians attend practice department meetings to both inform and stay informed about clients and projects. Getting in on the ground floor enables library staff to be of even more value to the firm. It's also key to stay involved with what other departments are doing, especially with the IT team. Ms. Perez commented that when the Drinker Biddle information services group surfaced the challenge of firm wide password management, the library happily shared their ERM solution.

For Sara Thomas, creating productive change at Miles & Stockbridge came as a result of huge staff turnover. She was able to leverage natural attrition to upgrade the research team with professional level experts, including those with the MLS degree and even a J.D. Her team now includes an archivist and someone with a background at the state law library. These credentials engender respect among the attorneys, and the varying background allow the team to look at research projects in a whole different way.

MORE INFLUENCE ON KNOWLEDGE EXCHANGE

Often, delivering excellent content, broad access and more services results in more influence. At CTR, they now enjoy a much more secure contractual funder relationship with the state Department of Transportation, there have been two promotions and a new full time hire into the library, and staff are going to quarterly meetings at TXDOT, including with the Technology Task Force, Strategic Planning and Legislative Affairs teams. The library's reputation has gone up tremendously they've earned a seat at the table.

At Miles & Stockbridge, the library's orientation, mentoring and training programs yield the most influence. Through them, attorneys and staff learn what the research team is there for, as experts with professional capabilities, credibility and diversity. And because of their productive partnership, the Business Development and Marketing team can honestly say that because of the library, the firm is not only maintaining but growing their business.

CONCLUSION

The experience of each of our panelists demonstrates that with a creative open-minded emphasis on delivering more content, more access, more services and more results—all aligned with organizational imperatives—special librarians earn a seat at the table, and therefore exert more influence on knowledge exchange. In what Phil Green refers to as today's "stretch environment," it's important to shift the conversation and be the agent of change aligned with organizational objectives. The bottom line: don't even try to shrink your way to success. Aim high, continually gather user feedback, use your imagination, select the right tools—and do more with more.

"We have an explicit departmental strategy to demonstrate value to the firm. We want to preserve the profession, and we're at a really delicate place where it could be easy to stagnate. We should seize the opportunity to use our voices... we have to use our voices... to say 'this profession is important'—to firm leadership, to me and to our clients—and to show that we are valuable and why."

—Sara Thomas, Miles & Stockbridge

ABOUT LUCIDEA

Lucidea is a knowledge management software and solutions company that provides the infrastructure and business process know-how to help information intensive organizations easily collect, organize, and leverage their corporate knowledge. Our products improve accessibility and use of information assets for the people who need this knowledge most – employees and customers – resulting in higher employee productivity, lower operational costs and increased customer satisfaction. With a global customer base of more than 2,300 active clients in more than 50 countries, Lucidea is the largest provider of knowledge management solutions to corporations, law firms, non-profits, government agencies, museums, and archives worldwide.

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