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**Expanding the Collection:
How the Social Law Library and the Institute for Advanced Legal
Studies closed the gap and expanded patron access through document
delivery**

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Nearly twenty years ago, Harvard Law School Librarian Harris S. Martin III wrote a prescient article¹ that foresaw a future where worldwide interlibrary collaboration was the best way not only to control costs but also to expand resources. The article predicted that increased interlibrary cooperation would be the most sensible way of “tapping the total world of legal information – a world even the largest research library can no longer accommodate within its walls.” Anticipating an accelerating need for libraries to provide patrons ready and reliable access to international materials, he envisioned a global network of cooperating institutions coming together as a “megalibrary” that would minimize costs and maximize resources for all. Martin foresaw that those “who are willing to help build the infrastructure of the megalibrary, are the most likely to benefit.”

This article reports on how a premier American law library (with an unsurpassed fifty-state collection) and a preeminent English law library (with an unrivalled European collection) have built a working relationship that allows their respective patrons to tap into the complementary strengths of each other’s collection and services. The Social Law

¹ Harry S. Martin III, *From Ownership to Access: Standards of Quality for the Law Library of Tomorrow*, 82 Law Library Journal 136 (1990).

Library (SLL) and the Institute for Advanced Legal Studies (IALS) entered into an agreement to provide document delivery and reference services to the members of each others library. This new service fulfills the needs of each institution to provide foreign materials to their local patrons without overburdening the acquisitions budget.

The Social Law Library, a membership law library in Boston, Massachusetts, USA, serves a diverse population of 14,000 patrons from the bench, practicing bar, state and federal governments and legal service agencies. The strength of Social Law's collection is domestic American law. With over 500,000 volumes, its fifty-state collection of U.S. practice materials is comprehensive, providing "one stop shopping" for law firms that have active national practices. But virtually all of the Social Law Library's "big firm" members have a growing network of branch offices that span the Globe, and they are thirsty for quick access to international materials and expert reference services, both of which play to the strength of London's Institute of Advanced Legal Studies.

Affiliated with the University of London, the Institute of Advanced Legal Studies is a post-graduate research institute that serves its faculty, students and subscribers from the legal profession, many of whom have clients doing business throughout the United States. The IALS Library has over 278,000 volumes, the majority of which are housed at the Institute site on Russell Square in Bloomsbury. Its collections of foreign and international law are the most extensive in the United Kingdom.²

Both the Social Law Library and the Institute of Advanced Legal Studies provide document delivery and expert reference services to their respective patrons. Both understand the often urgent needs of time-pressed practitioners for information and materials in each other's practice-oriented collections. Both are also members of the

² IALS Website: http://ials.sas.ac.uk/about/IALS_mission.htm

New England Law Library Consortium (one of the many cooperating library groups that constitute part of Terry Martin's mega library). Given these similarities and the way that their collections complement each other, it made sense that the Library and the Institute would forge a close, working relationship.

At a meeting of the New England Law Library Consortium in 2005, Robert J. Brink, the Social Law Library's Executive Director, and Jules Winterton, Associate Director and Librarian at the Institute for Advanced Legal Studies, noted the similarities about the missions of their two libraries and mused about how meaningful it would be for their patrons if they worked together. Robert and Jules decided after a few exchanges that this was a worthwhile pursuit and decided first to coordinate their document delivery services, followed by an effort for the reference departments to communicate more closely. They handed over to Mark Hayward, the Subscription Services Manager at IALS and me (Access Services Librarian) the logistics of the first phase document delivery project.

Given the demands of our respective law-firm patrons for almost instant access to information --- "rush" orders are the norm --- our mandate was to devise a true working relationship between our libraries, so that patron services would be swift and seamless. The goal was to develop a first-hand understanding of each other's collections and foster a first-name rapport with each other's staffs. Such familiarity would be the key to offering the fastest and most reliable service possible.

Starting in 2006 Mark Hayward and I had monthly phone conversations during which we discussed how each of our library's document delivery service operated. We looked at

myriad issues that were involved in opening up our respective services internationally.

We considered the following issues as we moved forward in our cooperative venture:

- Copyright issues
- Fees, payments and exchange rates
- Document delivery technologies
- The order placement/fulfillment process
- The potential impact of an imbalance between the requests submitted by each library
- Staff impact
- Impact of time differences between London and Boston
- Exchange visits to help build the relationship/agreement and to reach a first-hand understanding of each other's library

Copyright law is different in both countries. We addressed our individual copyright policies to coordinate our efforts to meet the legal requirements of both countries – copyright fees are paid upfront for all IALS-provided documents while documents leaving the Social Law Library have a notice of copyright attached, providing patrons with the notification required to obtain copyright through the Social Law Library and the Copyright Clearance Center.

Simply stated, the way the service works for patrons of both institutions is that each library has a membership at the other library. This means that the Social Law Library can order from IALS and vice versa, thus keeping the time required to process the orders to a minimum and so that billing is manageable for each library. For patrons, there is no change. When a member of the Social Law Library needs a document from IALS, s/he

contacts our Document Delivery Office and places the order in the customary manner. Social Law handles the order, delivery and billing for the patron with no need for currency exchange or patron-initiated calls to London. Orders placed with IALS are handled in the same manner. As IALS does not process orders for non-member firms, the “membership swap” between the two libraries enables easy access for both.

The libraries initially considered offering photocopying services at no charge. However both agreed that a fee-based service would lessen the impact should the balance of requests be tipped in one direction or the other. It was apparent that if the fees were waived, and one library got most of the work, the agreement would quickly become burdensome for the providing library. The fee arrangement that we settled on requires that the providing library charge the requesting library its member rates for the requested document – these charges are then passed on to the end customer. With this model any work performed will be compensated for by the charges for the service – neither library will process orders free of charge.

The technology required for this project to succeed is in place or being developed and presents no issues. Each institution is equipped for scanning and e-mailing documents and can handle faxes. For the ability to easily resend an order that was not received digital delivery is the method that is preferred by both libraries. Each library also has a sophisticated online ordering system that allows orders to be electronically placed and tracked. These systems also handle invoicing and billing chores. In the beginning stages of the agreement each library agreed to pay the other’s invoice by credit card to minimize the impact of currency exchange.

Mark and I both expect that our current staffing levels will suffice to cover any extra workload that is brought about by our agreement. Of course, if workloads are dramatically increased that would be great for both libraries as the cost of new staff could be offset by the increased revenues from the service.

The time difference of five hours between London and Boston is not so large that it creates a problem; in fact, at times it is beneficial. A late day request from the United States could be filled and back to SLL before the start of the next work day.

Alternatively, a late request from IALS could be e-mailed back during the same day, and also be available for early customer delivery the next morning. Both services are staffed during customary local business hours.

To foster a better working relationship between the libraries, I visited IALS in December, 2007. The IALS library management staff took turns explaining the various functions of the library and how their own work units were integrated into the entire operation. Visiting IALS allowed me to see first hand how their collection and procedures would complement our collection and the service we provide to our patrons. While in London I had the opportunity to visit a large law firm library and I had a private tour of the House of Lords library and the Parliament building. This trip was a wonderful experience both personally and professionally that helped cement the relationship between the Social Law Library and the Institute for Advanced Legal Studies. The Social Law Library looks forward to hosting a visit from Mark Hayward in 2008.

As a result of these discussions of important issues regarding our partnership, in 2007 the two libraries crafted an agreement that facilitates document delivery services to each other's patrons.

Although the service has been technically operational between the two libraries since the summer of 2007, there are many pieces of this project to be developed. To increase patron awareness, the libraries are drafting a formal marketing plan for implementation in the coming months so members of both libraries can become aware of the new service and how it can benefit their practices. Direct mail, e-mail, website postings and open houses will be utilized to educate each library's users about this new service. There are also plans to further the relationship between the two libraries by hosting exchanges of reference librarians.

This project is still in the initial stages of development; careful consideration is given to each step to minimize pitfalls; forward progress is deliberate. Despite that, a number of orders have already been placed and filled. Even with this limited number of requests and without a full-scale marketing plan yet implemented, it is already clear to both SLL and IALS that each of their collections complement the other to provide greater depth and breadth to both. The e-mailing capabilities and the billing systems have worked well and the participants anticipate no issues with an increase in document delivery orders. Both institutions are excited about the growth of this service and anticipate a long-term commitment to the program.

Now that the document delivery phase of the project is nearing completion, the two organizations will see if there are similar symmetries between our respective reference staffs.

In 1990, Harvard's Terry Martin envisioned that megalibraries would emerge from such cooperation. Although busy legal practitioners care very little about the source of the information that they need, the SLL and IALS partnership provides them access to a

megacollection. By working through this project from concept to implementation, both institutions have learned a great deal about the value of resource sharing and the manner in which it can benefit both libraries and their patrons.



IALS Subscription Services Manager, Mark Hayward (L), and Social Law Library's Access Services Librarian, Michael Saporito, in the staff work area at IALS. (December, 2007)



Michael Saporito giving a presentation to IALS staff about the operations and history of the Social Law Library. (December, 2007)

URLs

<http://www.sociallaw.com>

<http://ials.sas.ac.uk/>