



Research Skills

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Learn with LiRN 2025

October 23, 2025

Starting the Research Process

Tip 1: Get the person to submit the question electronically

Tip 2: Copy the text of the question into a Word document and/or print it out

Tip 3: Read the question and determine if a particular date range, jurisdiction, or content type has been requested

Tip 4: Break multi-part requests down into separate questions

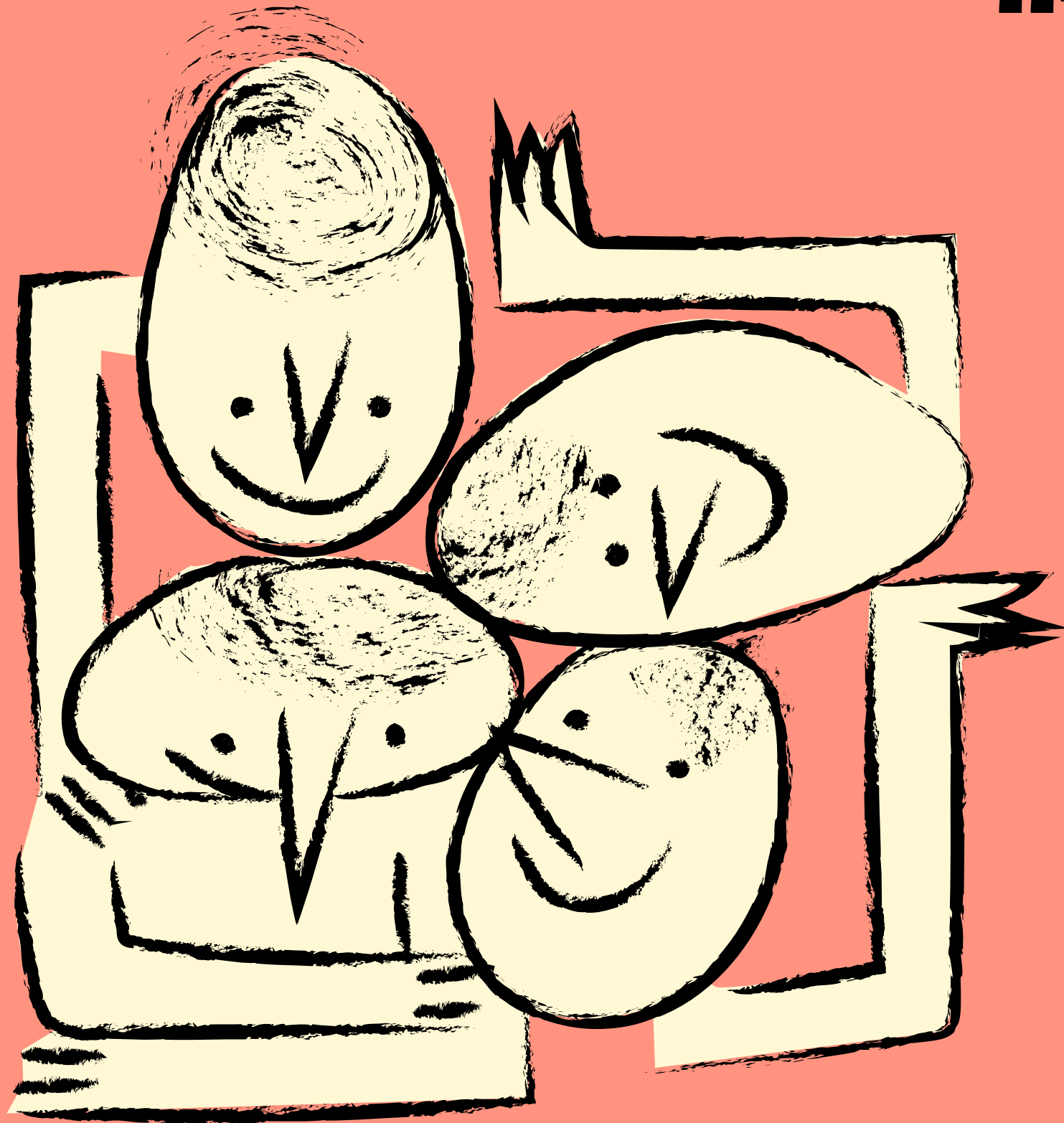
Tip 5: Save documents with requester names and pinpoints in the file name

Tip 6: Replying with results

The Reference Interview

Ciara Ward
Northumberland County Law Association





**“This is great ... but
not what I was
looking for...”**

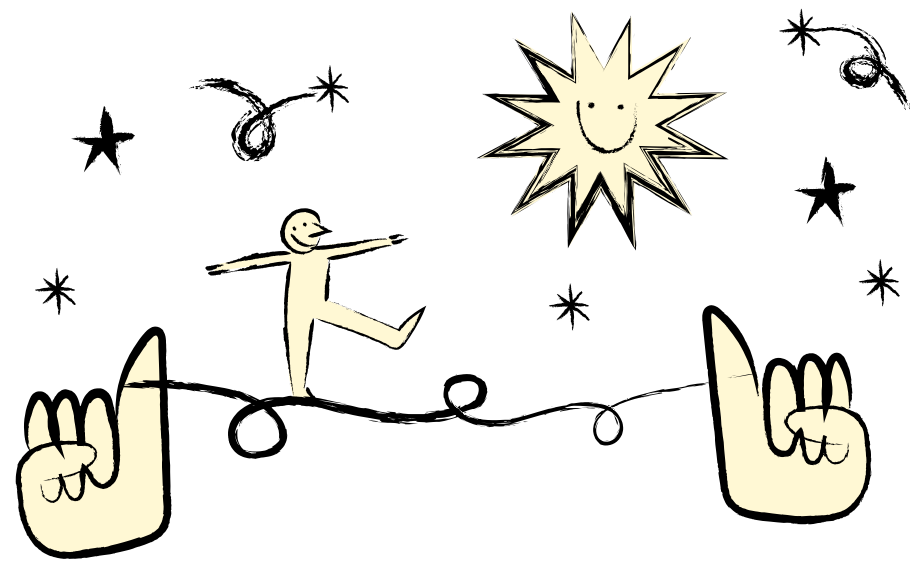
Reference interviews help narrow down what
they are really looking for

Step 1: Open-Ended Questions

- * What can you tell me about your case/question?
- * I'm not very familiar with that area of law, can you break it down for me?
- * To cut down on duplication, what sources have you already checked?



Step 2: Think it Through



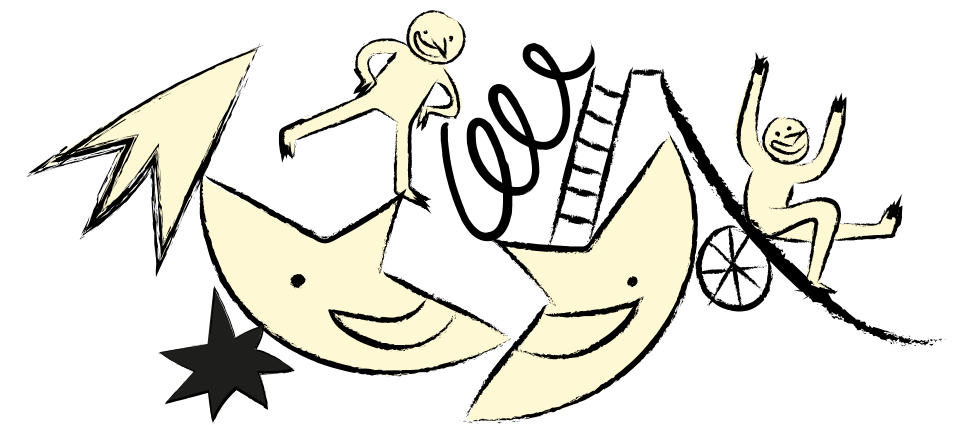
What do we know

Review the information
available to you



Get Creative

Look at the problem from different
points of view and identify different
key-words or sources to review

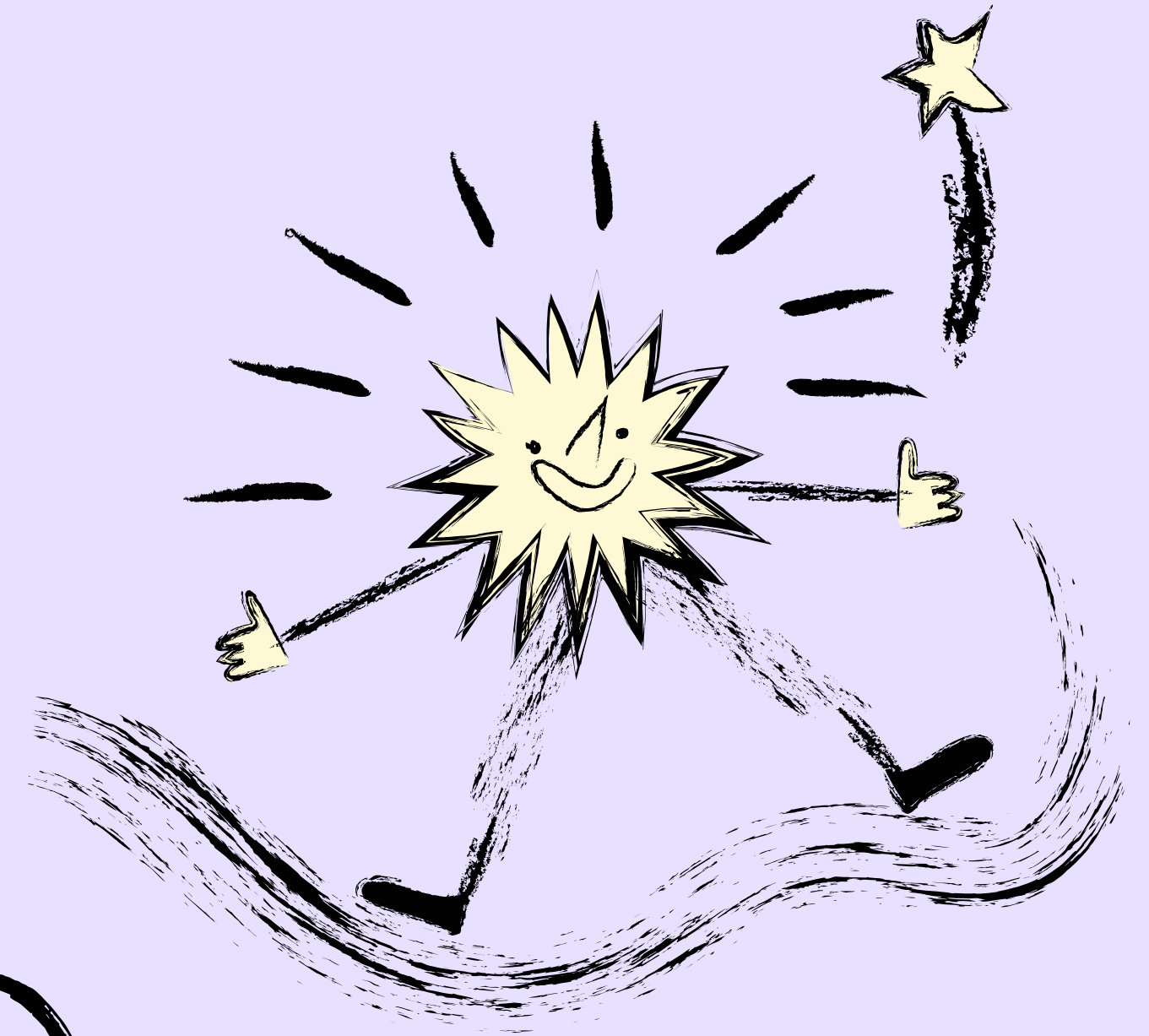


Talk it Out

When in doubt, phone
another OCLA Librarian!

Step 3: Big Finish

- * Send your work out into the world and don't forget to log your stats
- * Include details of what sources you used, and your search terms - in case it needs to be revisited



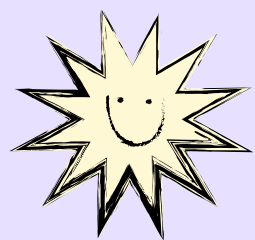
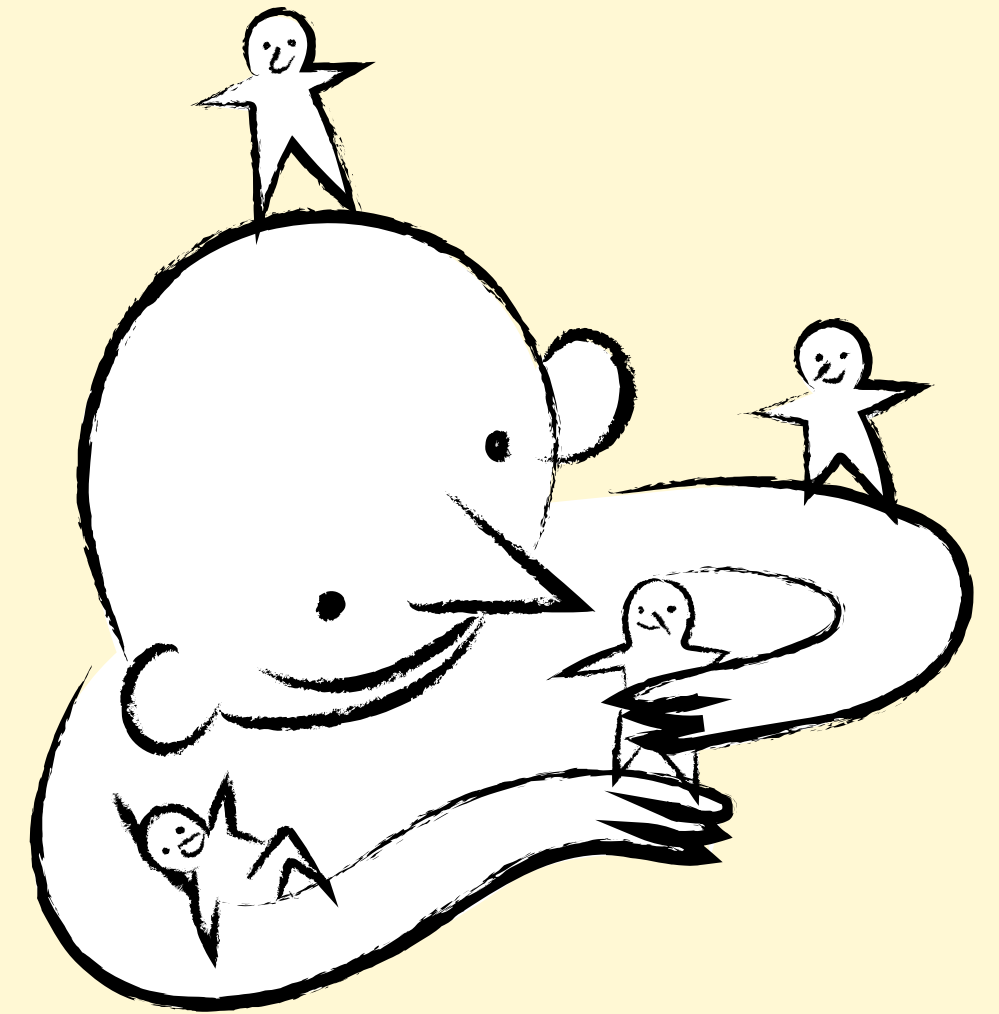
Two Pieces of Advice



Sometimes, you won't be able to find the answer. This happens to all of us, so don't be discouraged! Just keep moving forward with what you learned



Sigh. Sometimes, it's ok to Google. Google will not give you the answer, but it can be a good starting point for brainstorming search terms or sources.



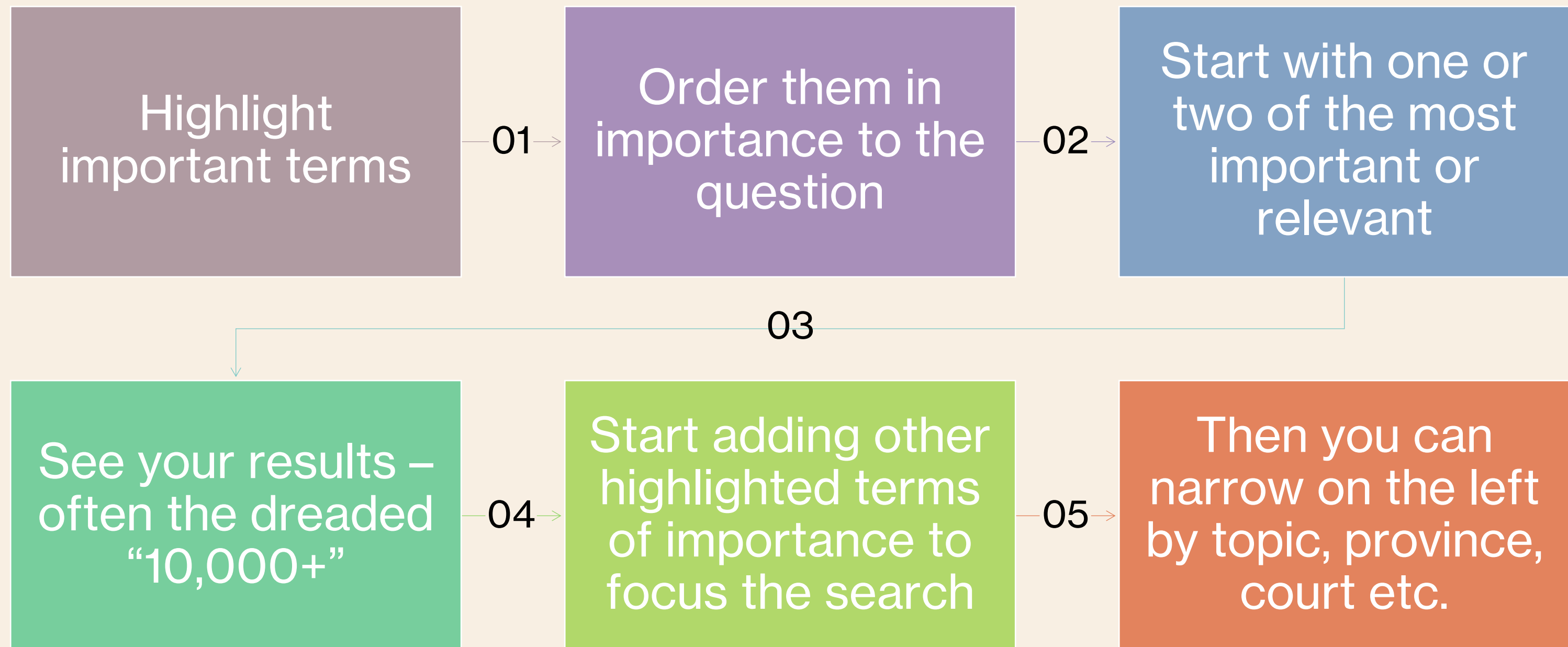
"Permission to fail = Permission to succeed" - B. Tinney

The Search

And how to tame it



Triage - Step by Step



Example

- * “good faith”
- * “good faith” and termination
- * “good faith” and “termination for convenience”
- * = 4 good results

I am looking for recent caselaw that discusses the application of good faith in contract performance as it relates to the use/enforcement of termination for convenience clauses or termination without cause clauses, in commercial contracts.

Search Term Connectors

1. AND

2. AND NOT

3. OR

Proximity Connectors

pre/n – first word before second word within n words
e.g. summary pre/3 judgement
Variations – pre/p (within paragraph, pre/s (within sentence)
Note that the p has a limit of 75 words

w/n – two words within n words of each other
e.g without /4 cause
Variations – w/p within paragraph, w/s (within sentence)

atleast – find a word, term or phrase so many times
atleast10(CYFSA)

Wildcards

! (or *) – root word plus
employ! Gives employ, employer,
employed, employment, etc.

? – replace a letter in a word to
find different spellings
wom?n searches for woman,
women

Characters Ignored in Search

#

\$

%

§

=

-

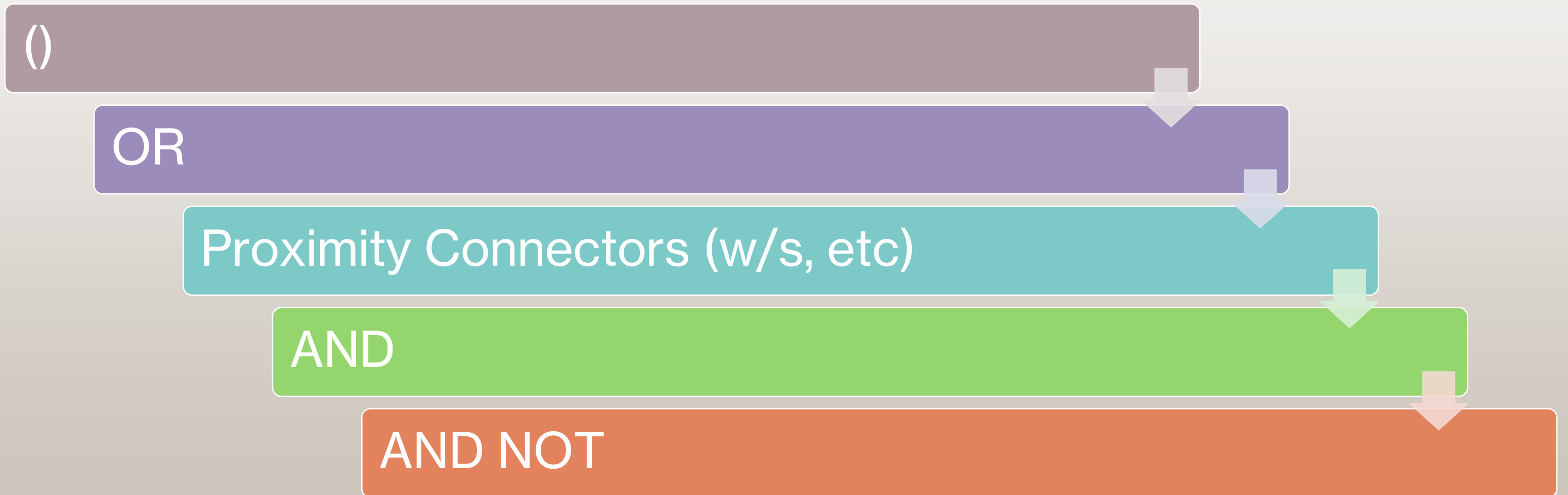
“”

/

.

&

Order of Priority



SETTING BOUNDARIES

Brenda Lauritzen
County of Carleton Law Association

We are not lawyers

- We don't have all of the information
- We cannot make nuanced legal decisions
- We should never be reading and interpreting case law
- We cannot provide legal opinions



Legal Advice vs Legal Information

**Provide Sources Not
Answers**

Language is Important

“Here’s what I found, please see
paragraph 49 of the attached case
for a discussion on that topic”

vs

“You can’t file an application for
that”

or

or
“Rule 25 may cover this, here’s a
note-up”

“The attached cases state that
mobility rights would not be an
issue here”

**Send Both Sides of
Arguments**

Service Standards

Have a Policy for this

- How long until they will receive a reply
- How long you will spend on something
- What you will and will not do
- Copyright / licensing limits

Differing levels of Service for Different Clientele

- Students vs Lawyers vs Judges

Can't Find Anything?



Can't Find Anything?

- It's okay! Research is messy.
- Understand where you are in their research process.
- Ask more questions from the client (It's ok to say you're stuck!).
Ask if they have anything to go off of.
- Ask a colleague!
- Send what you have found. It's their job to frame what they did find, so sending anything you have may still be helpful.

Practical Legal Research

<https://albertalawreview.com/index.php/ALR/article/view/17/17>

Session: “So someone asks you a question...”

Starting the research process

Cynthia Simpson, Middlesex Law Association

I am going to kick off the session with tips on the mechanics of starting the research process. These are all fairly basic ideas, but even I, after decades of research work, have modified my techniques, so I thought this information might be helpful for others. These tips are all just suggestions, so tailor them to suit your needs.

Tip 1: Get the person to submit the question electronically

- Actively encourage members to email you their questions or use an intake form if you have created one for your website
- People generally formulate more complete reference requests if they type them out rather than when they verbally relay a request over the phone
- Sets up a communication channel with their contact details for a quick response or clarification
- Easy to copy case citations from their request and paste into a database or even copy their terminology as keywords

Tip 2: Copy the text of the question into a Word document and/or print it out

- Allows you to copy and paste their phrasing into a database
- Can highlight relevant terms to build your search strings
- Provides a place for you to add your search strings, variations, and number of results that you can then copy into your email reply to them

Tip 3: Read the question and determine if a particular date range, jurisdiction, or content type has been requested

- You may need to follow up with the requester if you start searching and the results are high
- The person may only want Ontario decisions, or only appellate level decisions. The law may have changed in 2021, so they are only interested in cases since that date
- Don't assume they have told you everything you need to know!

Tip 4: Break multi-part requests down into separate questions

- Allows you to split the work between more than one person in your library
- Reply to each sub-part in a separate reply and indicate that the attachments correspond to item #1, #2 etc,
- Ensures the requester knows the progress of the work you are doing

Tip 5: Save documents with requester names and pinpoints in the file name

- For example, I might save a file for a user named Brown as: brown-para 43-R v Taylor so that I remember to draw their attention to paragraph 43.
- If Lawyer Brown has sent a multi-part question, I save the files as brown1-para43-R v Taylor, so I know it's for the first question in the request
- Alternatively, you can create folders for each request

Tip 6: Replying with results

- Tell them where you looked – Westlaw, Lexis+, vLex, text/commentary title, etc.
- Send them the search strings you used (or at least the most successful ones)
- The requester may see where your search terms were not best for their question or if they neglected to provide you with relevant parameters that should be included
- Don't forget that sometimes no answer **IS** an answer. It is best to stop searching, send them your search strings, and seek clarification.