2002 Private Law Library / Corporate Law Library SIG Operations Survey

by Joan Rataic-Lang, Anna Holeton and *Lynne Mogenson*

Introduction

Our work environments are constantly changing, but despite these complex times our challenge remains constant; we must provide continual outstanding client service. Such rapid change in technology means that we need to be quick to react or at least be well informed on technological issues. To keep up with new issues, so many questions have been added in 1998 & 2002 that completing this survey is a time-consuming task. Further, the survey is conducted only every 3 years, is that often enough to capture and reflect the issues? Perhaps a shorter, more focused survey could be done every 2 years.

Although the pace of change in law libraries and our parent organizations is escalating, only minor modifications were made to the survey questionnaire used in 2003. These few changes were suggested by PLL/CLL SIG members attending CALL's 2002 conference in Victoria. The majority wanted to keep the survey instrument much as it was when the last survey was conducted in 1998.

No survey happens without the efforts of many people. We would like to express appreciation to:
- *Anna Holeton* who revised the survey, stuffed and mailed it, and edited this report. After two surveys, *Anna* has resigned as survey committee Chair. Since the demise *of Campney & Murphy* in August 2003, she is now working as a reference librarian at *UBC Law Library*.
- *Lynne Mogenson* for her assistance in revising the survey,
- *Annamarie Bergen, Lynne Mogenson* and *Anna Holeton* for their work on the 1998 survey which provided comparative information,
- the staff of the *Dalhousie University Statistical Consulting Service* who entered and collated the data and determined relevant correlations, and finally
- the survey respondents who gave of their time to make this survey a success.

Return Rate

One hundred sixty surveys were distributed in February 2003 to private and corporate law libraries, of which 87 surveys were returned. This 54% return rate is a significant improvement over the 1998 survey when only 33% were returned. This improvement may be due to concerted efforts to hone the mailing list and distribute only one survey per law library to the person chiefly responsible for it.

LIBRARY STAFFING

Not unexpectedly, the more lawyers working at a firm or corporation, the more permanent library staff employed. However, we have seen an increase in the ratio of users to library staff in

firms. In 2002, the ratio of users [lawyers, legal assistants & students] to full-time equivalent (FTE) library staff for the 87 responding libraries was between **42:1 and 49:1** [median 41.50, mean 49.37].[1] However, in the 1998 survey, the ratio of users to FTE library staff was between **38:1 and 40:1** [median 38, mean 40.27]. This change in staffing ratio is disturbing. Either library staff is actually decreasing as the number of users is growing without additional staffing for libraries. These result differ from those found by the second [AmLaw Tech Library Survey](2)[2] where 38% of the 88 responding libraries had increased their staff over the previous two years.

In 2002, fewer libraries [28.7%] contracted out to service bureau or non-firm employees than in 1998 when only 34.5% contracted out. The services contracted out were varied from clerical to skilled tasks: photocopying [10.3%], loose leaf filing [5.7%], cataloguing [5.7%], on-line searching [1.1%] legal research [1.1%], Internet or intranet development [3.4%], and other [4.6%]. Three libraries contracted out all functions because their respondent was not an employee of the firm.

Elsewhere, non-library employees of the firm perform some services. Photocopying was the most common [43.7%], with loose leaf filing [35.6%] and internet/intranet development following [23%].

LIBRARY SERVICES

Despite earlier predictions we are not a paperless society, as evidenced by the amount of time spent on loose-leaf filing. Since 1998, time spent on loose leaf filing [Q11] has decreased. The majority [79.3%] spend 15 hours or less on filing, and no library spends more than 25 hours per week on this task. In 1998 some libraries indicated they spent up to 35 hours per week on filing.

Routing Table of Contents is still a very popular tool in libraries, with 90.8% of respondents offering this service. Of those, most still route photocopies [83.5%], or originals [64.6%]. In 1998, 100% routed photocopies while only 9.6% scanned. Scanning has grown to 34.2% in 2002. However, digitization of Tables of Contents is also having an impact on traditional routing, with 65.8% now routing the vendors' electronic version.

Surprisingly 58.6% replied "no" to producing a newsletter, while 40.2% do offer this service. Of those producing a newsletter, 68.6% offer it electronically, 14.3% offer print only, and 14.3% offer both print and electronic versions. The use of electronic newsletters has grown since 1998, when only 26.7% produced it electronically and 13.3% offered both formats. Newsletter content is generally library-specific [57.1%], although nearly a third [28.6%] produced newsletters containing both library and firm-wide content.

Direct service to clients is provided by 37.9% of libraries. The variety of direct client-service work ranges from: copying of cases, legislation monitoring, current awareness, document

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[1] A positive correlation of 0.873 was found between the number of lawyers and number of permanent library staff. (Questions 3 and 9).
[2] http://www.law.com/special/professionals/amlaw/2003/library_survey.shtml

delivery, interlibrary loan, to research to recommending/buying books. While these services are provided, many respondents indicated their provision was an infrequent occurrence.


LIBRARY BUDGET

In most cases the librarian prepares the library budget unassisted [74.7%]. Approximately ten percent prepare the budget with help from the library partner [9.2%], or prepared it jointly with firm management [10.3%]. In three libraries [3.4%] the library budget was prepared by firm management -- most likely because all library services were contracted out.

The library budget was generally approved as estimated [73.6%], although for some the budget estimate was reduced before approval [13.8%]. In contrast, the 1998 survey found 90.6% received approval of their budgets as estimated. In 2002, a lucky few actually saw their budget increased prior to approval [5.7%].

Cost per lawyer
The big question is always "cost per lawyer" because it is usually how lawyers conceptualize library expenses. "Cost per lawyer" was calculated by examining total expenditures for print, binding, lawyers' copies and CDs -- while <u>excluding</u> costs for online, supplies, capital costs and library staff salaries. In 2002, a cost per lawyer expenditure of $2501-$3000 was most common [24.1%], followed by $2001-$2500 [18.4%]. Expenditures of $1501-$2000 [13.8%] or $3001-$3500 [12.6%] were nearly equally common. A few libraries spent over $5001 [2.3%] while one library spent less than $1000 per lawyer. Over forty percent of libraries [42.5%] spent between $1001-$2500 per lawyer, while over half [56.3%] spent between $1501-$3000 per lawyer in 2002.

How do 2002 "cost per lawyer" figures compare with those for 1998?
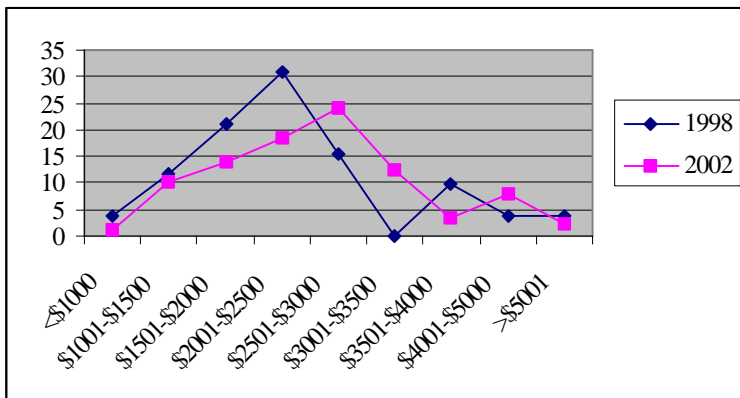
Graph 1: Comparison of 2002 cost per lawyer expenditures with 1998 cost per lawyer
[showing percentage of libraries]

In 1998, the majority of libraries [67.4%] spent between $1501-$3000 per lawyer. Of these libraries nearly a third [30.8%] spent between $2001 -$2500 per lawyer. Less than one quarter [17.2%] spent between $3500 -$5001 or more, while 15.3% spent less than $1500 per lawyer in

1998. As you can see from Graph 1, "cost per lawyer" has increased approximately $500 per lawyer since the 1998 survey.

How does this compare with data from the AmLaw Tech Library Survey?

"In 2002, how much did the firm spend running its libraries in all offices? Please exclude staffing and expenses related to computer-based research applications like Westlaw and Lexis-Nexis. Include the library's share of firm overhead.
Per Lawyer: Average: $3,816   Median: $3,527
Number of respondents: 52

These must have been libraries in very lucrative firms, however, because their budgets were much richer: Library budget: Average: $1,890,753 Median: $1,661,300

Print
A significant portion of library budgets is still spent on print materials, i.e. books, CLEs, law reports, annual print subscriptions, binding and lawyers' copies. One in eight libraries [12.6%] spend less than $50,000, or between $75,001-$100,000, or between $125,001-$150,000. However, one in five libraries [23%] spent over $250,001 on print alone.

In general the more lawyers served, the more money was spent on print.[3] The amount spent on print increased between 2001 and 2002 for 67.8% of libraries, while 23% saw print expenditure decrease during this period. Those spending less on print indicated the main reason for canceling print in the last 3 years was due to budgetary constraints.

Office Copies - Rules of Court
To practice effectively, litigators need office copies of the Rules of Court. Even though these office copies are not truly a part of the library collection, this expense is included in the library budget for the majority [79.3%] of libraries surveyed. For 14.9% of responding libraries, lawyers' copies of the Rules of Court are part of the firm/non-library budget, while at 4.6% of responding libraries lawyers pay for their court rules directly.

Office Copies – other than Rules of Court
Office copies other than Rules of Court are also considered a library budget expense for the majority of responding libraries [71.3%]. Some libraries are relieved of this expense where lawyers' office copies are paid for by the firm's budget [11.5%], lawyers [10.3%], or a non-library budget [5.7%]. Of the 57 libraries that answered Q33 re the amount spent on personal office copies, the mean amount was $20,120 while the median was $9,300 and the maximum spent was $152,065.

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[3] There is a positive correlation between the number of lawyers and amount spent on print publications. [Question 3 and question 28 produced a positive correlation of 0.731.]

COST RECOVERY

Client Billing

Almost a quarter of the libraries are in the enviable position of recovering 71% or more of online charges through disbursements, while 14.9% are actually find online charges a profit centre because they recover more than 100%. As with print expenditures, the amount spent for online increased between 2001 and 2002 for 75% of the libraries, while online expenditures declined during this period for less than one in ten libraries [9.2%].

<u>Online Search Costs</u>

Quicklaw flat rate: Most libraries [93.1%] have a flat rate agreement with *Quicklaw*. Of the 81 responding libraries, 79 explained their charge back policies: 8 charge back at the effective rate, while 39 charge back at *Quicklaw*'s regular hourly rate and 32 charge back at another rate.

Lexis flat rate

Less than half [40.2%] have signed up for a *Lexis* flat rate. Of these 44 libraries, 19 charge back at *Lexis*' discounted rate, while 19 charge back the regular hourly rate and 6 charge back at another rate.

Westlaw-eCarswell flat rate

Forty-one libraries [48.2%] have signed a *Westlaw-eCarswell* flat rate agreement. Of these, fifteen charge back the *Westlaw-eCarswell* suggested charge back rate, while 15 charge back a percentage of the *Westlaw-eCarswell* suggested rate, and 12 charge back another rate.

Other Online Services

The traditional online services -- *Dialog*, *Factiva/DJI*, *Infomart*, *Lexis-Nexis*, *Livedgar* and *Newscan* -- are still used by libraries primarily on a transactional basis. What has changed is that the list of titles libraries access is much longer now than in 1998.

As our end users get more experience searching and since vendors provide more varied pricing packages, libraries naturally provide access to online services to users outside the library staff.

While lawyers and students usually have access, *Quicklaw* access is also being provided for legal assistants/paralegals [43.7%]. A growing number of responding libraries [14.9%] also provided *Quicklaw* access to secretaries.

Non-research lawyers have access to a variety of electronic services: *Quicklaw* [92%]; *Westlaw-eCarswell* [57.5%] and *Lexis-Nexis* [41.4%].

TECHNOLOGY

Library Catalogue and Databases

As in 1998, Inmagic, Inc.'s products were the most common library catalog software in use by survey respondents. *DBTextworks* was used by 40.2%, while some libraries [6.9%] are still

using legacy versions, *Inmagic/Inmagic Plus*. Only 14.9% also used Inmagic's browser software *WebPublisher*. The next most popular software for catalogues was *Sydney/Sydney Plus* [6.9%] and *Eloquent* [2.3%]. However, one in five libraries [21.8%] used "other" software. Fewer than one in ten libraries [6.9%] has yet to automate their catalogues.

Legal Memoranda
Perhaps Inmagic's software's popularity can be attributed to its multi-functionality. Of the 72 response to Q66 "What software do you use for legal memoranda?" twenty-three named an Inmagic product. Many firms are relying on their Document Management software to manage their legal memoranda: 17 indicating they used either Docs Open, PC Docs, Worldox or "document management software."

Who maintains the legal memo databases? Nearly half [49.4%] of responding libraries indicated they maintained these databases. But 46% said they did not maintain them; for most, either research and Knowledge Management services did this, but these were not the only responses.

CD-ROM
Results from the last survey presumed every library had a CD ROM drive -- either as a standalone or networked drive. In 2002, 73.6% of respondents indicated CDs are available on the LAN, while WAN CD access was available to a few external users [6.9%] or branch libraries [8%]. If the CD drive is standalone, the library staff is often responsible for updates [39.1%] while networked CDs are generally handled by I.S./I.T. staff [65.5%].

One interesting aspect of CDs usage centers on the number of CD titles accessed. Of the 80 respondents the mean number of CD titles was 14.80. That is an increase from 2001 where the mean was 1.16.

The amount libraries spend on CDs is another indication of a trend in the area. The mean amounts spend by year were: $26,055 [2001], increasing to $27,181 [2002], but declining to an estimated $24,913 [2003]. A small decrease but not enough to indicate a wholesale departure from CD technology. CDs have been replaced by internet in only a mean of 1.72% of responding libraries. This is particularly interesting since many have predicted CDs are a vanishing format.

Intranet
In 1998, just over half of respondents [53.6%] worked in a firm or corporation which had an Intranet [37.5%], or where an Intranet was a work in progress [16.1%]. Most of these libraries prepared their own web page content [53.6%] although some also acted as webmaster [10.7%].

Despite what we think about the prevalence of internet/intranet technology, the 2002 survey shows only a ten-percent growth in intranets. In 2002, only 63.2% of responding libraries indicated that their firm had an Intranet, 11.5% said their intranet is in development and 25.3% said there was no intranet at their workplace. Perhaps the fact intranets are second generation [27.6%] or third generation [13.8%] in many workplaces is more revealing.

Where an intranet exists, the library's responsibilities naturally extend to library webpage development. One quarter [25.3%] provide content for conversion to HTML, while nearly half [47.1%] assume complete responsibility for the library webpages. Approximately one in ten libraries [13.8%] prepare firm intranet content, while 10.3% have intranet webmaster responsibilities.

Library catalogues were much more likely to be available on the firm intranet in 2002 [40.2%], than in 1998 [13.8%].

Once an intranet exists, maintaining it is an enormous task. "Content management" software is used in 17.2% of the firms, while not used in 46%. However, this question was not answered by 36.8%, which may indicate unfamiliarity with this technology. We need to become more knowledgeable about this sort of technology by reading more.[4]

Internet
Although there are a few [3.4%] who indicate that they never use the Internet for email or reference, regular internet users are by far the majority. The value of routine internet usage is acknowledged by law firms with 84.3% now providing firm-wide access on all desktops -- up nearly thirty percent from 1998 firm-wide desktop access [57.1%].

Where the library is slipping is in providing training. In 1998, library staff provided 82.8% of intranet training. In 2002, library intranet training declined to 63.2%. Is this decrease an indication of libraries being "too busy" or an indication that what was once seen as a "library thing" is no longer purely a library responsibility?

Access to pay-for-use websites is common with 48.3% of the libraries providing access to them, while an equal percentage [48.3%] do not. The list of websites is long with little evidence of pattern. It is interesting to note that some services referred to in earlier questions as online services were included as internet services. Perhaps the lines are blurring between online and web, so that the distinction no longer matters.

Libraries' use of "push" technology does not appear to have changed in the last couple of years. In 1998, 32.8% used "push" technology while in the 2002 survey 31% indicated using push, predominantly for tax information.

While internet usage is interesting, another internet issue is the library's role in creation and maintenance of the firm's external internet website. Nearly one in three [32.2%] indicated their active participation, while two thirds [66.7%] said they are not involved [Q77].

Firm extranets are not yet widespread; only 17.2% indicated their workplace had an extranet. Of those firms with extranets, approximately one in four [26.7%] libraries is involved in extranet development.

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[4] Content management is discussed in "Enterprise content management" by Debbie Schachter of the BC Courthouse Library Society http://www.sla.org/chapter/cwcn/wwest/v6n2/schachter.htm and in the members' only section of Special Libraries Association website http://www.sla.org/content/memberservice/inforesources/eips/memeip.cfm

On a positive note, libraries needs are included in the firm's technology plan for 65.5% of libraries responding.

FIRM MERGERS

Twenty-five respondents [28.8%] indicated their firm had merged within the last five years. Over half [52%] agreed the resulting library administration is "peer-to-peer." Levels of service integration vary. The firm intranet has been completely merged [48%] or is in the process of being merged [20%]. As for library functions, for most the library budget is developed separately by location [72%].

Other library functions also remain separate; most do not have a union serials list [52%], nor a global memo bank [64%]. However, some centralization of collection development / acquisitions / cataloguing [24%] and current awareness / resource sharing [36%] has occurred. Other functions were mentioned as having been centralized: business development / client team research; routing; and some contract negotiations.

Libraries in merged firms were split nearly equally on whether library budget account codes were separate by location [44.0%] or standardized, using national account codes [48.0%].

CONCLUSION

Information is power. This report only summarizes highlights of the 2002 survey results. Complete data and comments can be found below.

Thank you to everyone who already provided comments; they will be given due consideration.

The time has come to re-examine the purpose of this survey, and retain only those questions that are relevant to library service goals . By clarifying the purpose of the survey we can determine whether it is fulfilling our current needs.

After reading this report, please send further comments or suggestions to jrataiclang@osler.com

2002 CALL Private /Corporate Law Libraries OPERATIONS Survey

INSTRUCTIONS:

♦ **FILL OUT ONE SURVEY ONLY FOR EACH LIBRARY. DISCARD DUPLICATE SURVEYS.**
  Branch libraries within a firm or corporation should complete their own survey, answering as many questions as possible.

♦ **CONSULTANTS should complete ONE SURVEY for each of the libraries they manage.**

♦ **Generally, answers should reflect data for the twelve-month period ending 31 December 2002.**
  Please refer to your 2002 [& 2001] budget(s) rather than estimating amounts.

♦ **CHECK ONE ANSWER ONLY UNLESS OTHERWISE INSTRUCTED.**

PRELIMINARY QUESTIONS

I am NOT able to complete this survey because I am:

	N	%
Not working in a private or corporate law library	2	2.2
Not Answered	0	0.0
Able	87	97.8
Total	89	100.0

Is your library a branch library within a larger system?

	N	%
Yes	11	12.6
No	69	79.3
Not Answered	7	8.0
Total	87	100.0

Do you prepare your own budget?

	N	%
Yes	9	81.8
No	1	9.1
Not Answered	1	9.1
Total	11	100.0

THE BASICS

1. Type of Library:

	N	%
Law Firm	79	90.8
Corporation	7	8.0
Not Answered	1	1.1
Total	87	100.0

2. Jurisdiction

	N	%
British Columbia	20	23.0
Alberta	15	17.2
Saskatchewan	2	2.3
Manitoba	2	2.3
Ontario	35	40.2
Quebec	6	6.9
Nova Scotia	6	6.9
New Brunswick	1	1.1
Newfoundland	0	0.0
Prince Edward Island	0	0.0
Yukon or NWT or Nunavut	0	0.0
Total	87	100.0

3. Lawyers

	N	%
Fewer than 25	12	13.8
25-49	20	23.0
50-74	17	19.5
75-99	7	8.0
100-124	10	11.5
125-149	5	5.7
150-174	4	4.6
175-199	2	2.3
200 or more	10	11.5
Total	87	100.0

4. Research Lawyers

	N	%
None	51	58.6
1	22	25.3
2	5	5.7
3	4	4.6
4	1	1.1
5 or more	4	4.6
Total	87	100.0

5. Articling students/ Stagiaires:

	N	%
0	5	5.7
1-5	36	41.4
6-10	20	23.0
11-15	14	16.1
16-20	4	4.6
21 or more	8	9.2
Total	87	100.0

6. Summer students/ Co-op students:

	N	%
0	15	17.2
1-5	40	46.0
6-10	16	18.4
11-15	5	5.7
16-20	4	4.6
21 or more	6	6.9
Not answered	1	1.1
Total	87	100.0

7. Paralegals / Legal Assistants / Law Clerks:

	N	%
0	6	6.9
1-5	28	32.2
6-10	18	20.7
11-15	8	9.2
16-20	8	9.2
21 or more	19	21.8
Total	87	100.0

8. Does the library provide direct service to the clients?

	N	%
No	54	62.1
Yes	33	37.9
Total	87	100.0

Other responses [categorized]:

FREQUENCY:
- a couple of times a year
- but seldom - in past year just ordered books for a client
- limited basis; pre-determined by billing lawyer [2]
- occasionally
- occasionally 2 - 3 clients
- occasionally an individual from a corporation calls directly for research
- on an occasional basis
- only in limited cases. Most client contact is through lawyers referring clients for a one-of question
- when arrangements have been set up first through lawyer responsible for file

WHO:
- clients have been in the office and specifically requested library help
- employees from other departments
- internal corporate clients
- our clients are the 20,000 Quebec Lawyers
- rarely but there are a few clients
- several of our clients have in house counsel formerly with the firm and they contact the library directly with billable research. A few other clients have a similar special arrangement

WHAT
- caselaw, news stories, legislation, research
- copies of cases
- current awareness & loan of library materials & research
- document delivery, legislation monitoring
- ILL & research
- lawyers come and go at any time
- lawyers often direct clients to the library for copies of cares, articles, reports etc
- on occasion called for research; use of library collection; arrange news clipping services
- providing copies of cases, legislation - Original contact through lawyer; subsequent contact direct from client
- recommend/buy books
- sort of - we distribute selected current awareness services directly to clients (i.e. Legislative Update)

LIBRARY STAFFING

9. **Permanent library staff, expressed as Full Time Equivalents (FTE).**

	Mean	Median	Min	Max
MLS &LLB	0.17	0	0	3
MLS	0.94	1	0	5
Library Technician	1.18	0	0	13
Library Assistant/ Clerk	0.71	0	0	27
Other	0.16	0	0	4
Total	3.15	2.00	0	48

MLS & LLB

FTE	N	%
0	76	85.4
0.6	1	1.1
1	11	12.3
3	1	1.1
Total	89	100.0

There were 89 respondents to this question -- including one courthouse library. Exactly how a courthouse library was included in the mailing -- is still a mystery.

MLS

FTE	N	%
0	35	31.2
0.1	1	1.1
0.2	1	1.1
0.4	1	1.1
0.5	1	1.1
0.6	1	1.1
0.71	1	1.1
0.8	2	2.2
0.85	1	1.1
1	23	
1.6	1	1.1
2	15	
3	2	2.2
3.2	1	1.1
4	2	2.2
5	1	1.1
Total	89	100.0

Library Technician

FTE	N	%
0	35	39.3
0.2	2	2.2
0.6	4	4.5
0.85	1	1.1
1	24	27.0
2	10	11.2
2.2	1	1.1
2.6	1	1.1
3	7	7.9
4	2	2.2
8	1	1.1
13	1	1.1
Total	89	100.0

Library Assistant

FTE	N	%
0	51	57.3
0.2	2	2.2
0.4	2	2.2
0.5	7	7.9
0.7	1	1.1
0.8	2	2.2
1	18	20.2
1.4	1	1.1
2	4	4.5
27	1	1.1
Total	89	100.0

Other

FTE	N	%
0	77	86.5
0.2	2	2.2
0.25	1	1.1
0.5	2	2.2
0.6	1	1.1
0.8	1	1.1
1	2	2.2
2	1	1.1
3	1	1.1
4	1	1.1
Total	89	100.0

Total [all categories]

FTE	N	%
0	**3**	**3.4**
0.1	1	1.1
0.2	5	5.6
0.4	1	1.1
0.5	1	1.1
0.6	4	4.5
0.8	3	3.4
0.85	1	1.1
1	**13**	**14.6**
1.2	1	1.1
1.3	1	1.1
1.4	2	2.2
1.5	2	2.2
1.56	1	1.1
1.8	3	3.4
2	**12**	**13.5**
2.2	1	1.1
2.5	2	2.2
2.6	2	2.2
3	**3**	**3.4**
3.5	2	2.2
4	**9**	**10.1**
4.2	1	1.1
4.25	1	1.1
4.5	1	1.1
5	**3**	**3.4**
5.5	1	1.1
6.5	1	1.1
7.6	1	1.1
8	**1**	**1.1**
10	**2**	**2.2**
11	**2**	**2.2**
48	1	1.1
Total	89	100.0

10. What is the ratio of users to Library staff FTEs?

Number	Mean	Median	St Dev	Min	Max
78	49.37	41.50	42.59	1	275

11. Average number of hours per week spent on loose-leaf filing:

	N	%
5 or less	24	27.6
6-10	25	28.7
11-15	20	23.0
16-20	9	10.3
21-25	3	3.4
26-30	0	0.0
31-35	0	0.0
36-40	0	0.0
41+	0	0.0
Not Answered	6	6.9
Total	87	100.0

12. What library services are regularly contracted out to service bureau or non-firm employees?

	N	%
None	62	71.3
Loose-leaf filing	5	5.7
Cataloguing	5	5.7
On-line searching	1	1.1
Legal research	1	1.1
Ordering	0	0.0
Internet or intranet development	3	3.4
Photocopying (for routing, etc.)	9	10.3
Other	4	4.6

- all; I'm not an employee [3]
- library database maintenance; library technology needs

13. What library services do non-library staff regularly perform?

	N	%
None	23	26.4
Loose-leaf filing	31	35.6
Cataloguing	0	0.0
On-line searching	14	16.1
Legal research	15	17.2
Ordering	0	0.0
Internet or intranet development	20	23.0
Photocopying (for routing, etc.)	38	43.7
Other	8	9.2

- accounting, i.e. bills
- circulation
- data entry
- docket inputting; some library database inputting
- fax
- Quicklaw billing follow-up
- scanning items to be routed
- special projects, regular database maintenance and updating

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LIBRARY SERVICES

14. Do you route Tables of Contents to Lawyers?

	N	%
Yes	79	90.8
No	8	9.2
Total	87	100.0

15. If you route Table of Contents, do you (n=79)

	N	%
Route originals	51	64.6
Route photocopies	66	83.5
Scan and route electronically	27	34.2
Route vendor's electronic contents pages	52	65.8

16. Do you produce a newsletter?

	N	%
Yes	35	40.2
No	51	58.6
Not answered	1	1.1
Total	87	100.0

17. If you produce a newsletter, is distribution format

	N	%
Print	5	14.3
Electronic	24	68.6
BOTH	5	14.3
Not answered	1	2.9
Total	35	100.0

18. If you produce a newsletter, is the content

	N	%
Library specific	20	57.1
Firm-wide	4	11.4
BOTH	10	28.6
Not answered	1	2.9
Total	35	100.0

BILLING

19. Hourly rate billed by Chief Librarian to client files or to other departments:

	N	%
Time not billed	23	26.4

	N	%
Less than $50	4	4.6
$51-$60	2	2.23
$61-$70	6	6.9
$71-$80	10	11.5
$81-$90	5	5.7
$91-$100	10	11.5
More than $100	23	26.4
Not applicable	3	3.34
Not Answered	1	1.1
Total	87	100.0

20. Is other library staff's time billed?:

	N	%
Yes	38	43.7
No	48	55.2
Not answered	1	1.1
Total	87	100.0

21. Other library staff time is billed at:

	N	%
The chief librarian's rate	13	34.2
A rate below the chief librarian's rate	23	60.5
Not applicable	1	2.6
Not answered	1	2.6
Total	38	100.0

22. In many firms, not all the time recorded as billable is actually billed to clients. If known what percentage of recorded time was actually billed to clients in 2002?

Number	Mean	Median	St Dev	Min	Max
11	65.75%	73.00%	32.61	0	95

If NOT known, estimated percentage billed:

	N	%
0-25%	17	28.8
26-50%	8	13.6
51-75%	17	28.8
76-100%	17	28.8
Total	38	100.0

BUDGET

23. Who prepares the Library budget?

	N	%
Librarian	65	74.7
Librarian and library partner	8	9.2
Librarian and firm management	9	10.3
Firm management	3	3.4
Not answered	2	2.3
Total	87	100.0

24. Was the 2002 Library budget amount:

	N	%
Approved as estimated	64	73.6
Reduced before approval	12	13.8
Increased before approval	5	5.7
Not answered	6	6.9
Total	87	100.0

25. 2002 budget amount was reduced by:

	N	%
Not reduced	0	0.0
1-4.9%	5	41.7
5-9.9%	2	16.7
10-14.9%	5	41.7
15-19.9%	0	0.0
20-25%	0	0.0
Other	0	0.0
Total	12	100.0

26. Calculate 2002 amount spent on a cost per lawyer basis.

	N	%
Under $1000	1	1.1
$1001-$1500	9	10.3
$1501-$2000	12	13.8
$2001-$2500	16	18.4
$2501-$3000	21	24.1
$3001-$3500	11	12.6
$3501-$4000	3	3.4
$4001-$5000	7	8.0
$5001 and over	2	2.3
Not answered	5	5.7
Total	12	100.0

27. Do you have a budget line up for CONSULTANTS fees?

	N	%
Yes	13	14.9
No	71	81.6
Not answered	3	3.4
Total	87	100.0

PRINT PUBLICATIONS

28. 2002 expenditures for print publications, including new books and CLEs, law reports, annual print subscriptions, binding and lawyers' copies.

	N	%
Less than $50,000	11	12.6
$50,001-75,000	7	8.0
$75,001-100,000	11	12.6
$100,001-125,000	7	8.0
$125,001-150,000	11	12.6
$150,001-175,000	7	8.0
$175,001-200,000	5	5.7
$200,001-225,000	3	3.4
$225,001-250,000	4	4.6
More than $250,001	20	23.0
Not answered	1	1.1
Total	87	100.0

29. Was this amount an increase OR decrease from 2001 print expenditures?

	N	%
Increase	59	67.8
Decrease	20	23.0
Not answered	8	9.2
Total	87	100.0

Area	N	Mean	Median	St Dev	Min	Max
Increase	49	9.72	8	6.10	1	30
Decrease	19	8.96	6	9.82	0	30

30. How many print subscriptions or titles were cancelled in the last 3 years specifically because of:

Area	Number	Mean	Median	St Dev	Min	Max
Budget constraints	87	8.78	0	19.30	0	100
Availability on-line	87	1.83	0	3.43	0	22
Availability on CD-ROM's	87	1.02	0	1.83	0	8
Availability on the Internet	87	1.72	0	3.66	0	25
Lack of Space	87	1.18	0	3.91	0	30

OFFICE COPIES

31. Who pays for lawyers' and staff office copies of the Rules of Court?

	N	%
Firm / non-Library budget	13	14.9
Lawyer	4	4.6
Library budget	69	79.3
Not answered	1	1.1
Total	87	100.0

32. Who pays for lawyers' & staff office copies of print publications other than the Rules of Court?

	N	%
Firm	10	11.5
Lawyer	9	10.3
Library budget	62	71.3
Non-Library budget	5	5.7
Not answered	1	1.1
Total	87	100.0

33. If known, amount spent on personal office copies of books for lawyers and staff:

Number	Mean	Median	St Dev	Min	Max
57	$20,120	$9,300	$28,162	$300	$152,065

34. Percent of PRINT expenditure amount spent on personal office copies of books for lawyers and staff: if known:

Number	Mean	Median	St Dev	Min	Max
24	8.46	7.6	5.83	0	24

If not known, estimate percentage spent:

	N	%
0-10%	28	56.0
11-20%	17	34.0
21-30%	2	4.0
31-40%	3	6.0
Total	50	100.0

Traditional commercial databases formerly delivered "on-line" -- even if now available via TCP/IP connection.

35. On-line database expenditures for 2002:

	N	%
Less than $5,000	4	4.6
$5,000-$10,000	3	3.4
$10,001-$15,000	4	4.6
$15,001-$20,000	7	8.0
$20,001-$30,000	10	11.5
$30,001-$40,000	7	8.0
$40,001-$50,000	8	9.2
$50,001-$60,000	5	5.7
$60,001-$70,000	4	4.6
More than $70,000	30	34.5
Not answered	5	5.7
Total	87	100.0

36. Was 2002 amount an increase or decrease from 2001 on-line expenditures:

	N	%
Increase	66	75.9
Decrease	8	9.2
Not applicable	6	6.9
Not answered	7	8.0
Total	87	100.0

Area	N	Mean	Median	St Dev	Min	Max
Increase	56	22.40	14.50	31.52	0	205
Decrease	6	22.97	21.50	12.67	7	40

37. On-line data base charges recovered in 2020 through disbursement:

	N	%
None	8	9.2
Less than 50%	11	12.6
51-60%	9	10.3
61-70%	9	10.3
71-80%	10	11.5
81-90%	9	10.3
91-100%	7	8.0
More than 100%	13	14.9
Not applicable	1	1.1
Not answered	10	11.5
Total	87	100.0

38. Flat rate or transaction subscription with these on-line database vendors

	Flat Rate		Transactional		Not answered	
	N	%	N	%	N	%
Dialog	3	3.4	27	31.0	47	65.6
Westlaw-eCarswell	54	62.1	11	12.6	22	25.3
Factiva/Dow Jones Interactive	9	10.3	39	44.8	39	44.8
Infomart	13	14.9	38	43.7	26	29.9
Lexis-Nexis	26	29.9	43	49.4	18	20.7
Quicklaw	81	93.1	3	3.4	3	3.4
LivEdgar [GSI]	1	1.1	30	34.5	56	64.4
Newscan[Cedrom]	3	3.4	10	11.5	74	85.1
Other	8	9.2	9	10.3	70	80.5

- Canada Stockwatch
- CISTI
- CLE Case Digest Connection [CDC] - weekly service - Annual Subscription
- FP online F; Canada Stockwatch F; MERX F; Dun & Bradstreet T; CCH Online F; Hein Online
- Maritime Law Book
- Online F, Saegis T
- QP LegalEze
- QP Source
- Securities Mosaic
- Soquij [2]
- TraceIt
- Westlaw

39. If your firm has a Quicklaw flat rate contract, at what rate are clients charged for QL searches?

	N	%
Quicklaw's effective rate	8	9.2
Quicklaw's regular hourly rate	39	44.8
Another rate	32	36.8
Not answered	8	9.2
Total	87	100.0

39A. If your firm has a *Lexis* flat rate contract, at what rate are clients charged for Lexis searches?

	N	%
Lexis discounted rate	19	11.5
Lexis regular hourly rate	19	21.8
Another rate	6	6.9
Not answered	52	59.8
Total	87	100.0

39B. If your firm has a Westlaw-eCarswell contract, at what rate are clients charged for Westlaw-eCarswell searches?

	N	%
Westlaw-eCarswell suggested charge back rates	15	17.2
A percentage of Westlaw-eCarswell suggested charge back	15	17.2
Another rate	12	13.8
Not answered	45	50.8
Total	87	100.0

40. At your firm, who searches Quicklaw – other than library staff, lawyers & students?

	N	%
No one	49	56.3
Legal assistants / Paralegals	38	43.7
Secretaries	13	14.9

41. What on-line services do non-research lawyers have password access to?

	N	%
Quicklaw	80	92.0
Lexis/Nexis	36	41.4
Westlaw-eCarswell	50	57.5
Factiva/Dow Jones Interactive	4	4.6
Dialog	3	3.4
Infomart	5	5.7
LivEdgar [GSI]	14	16.1
Newscan[Cedrom]	0	0.0
Other	14	16.1

- BC Online
- CCH Online / CCH Online Taxworks [2]
- CCH Tax; CCH Estate Admin & Planning [1]
- CISTI
- Delphion
- Insolvency Source
- internet subscriptions
- Maritime Law Book [4]
- NS Dept of Labour
- QP LegalEze [2]
- QP Source (Alberta) [2]
- Securities Mosaic, legal assistant
- Soquij / Soquij- Azimut / REJB [3]
- Tax Net pro

CD-ROMS / INTERNET SUBSCRIPTIONS

42. Is the Library's CD-ROM drive:

	N	%
Stand alone	46	52.9
Networked	63	72.4

43. If the Library has a standalone CD-ROM drive, who is responsible for installing the updates?

	N	%
Library staff	34	39.1
Information system staff	18	20.7
Not answered	35	40.2
Total	87	100.0

44. If the Library has a networked CD-ROM drive, who is responsible for installing the updates?

	N	%
Library staff	11	12.6
Information system staff	57	65.5
Not answered	19	20.9
Total	87	100.0

45. If the CD-ROMS are networked are they accessible via

	N	%
LAN	64	73.6
WAN [access for external users of one library]	6	6.9
WAN [access for branch libraries sharing access]	7	8.0
Not applicable, CD-ROMS not networked	5	5.7

46. Total # of CD ROM titles

Number	Mean	Median	St Dev	Min	Max
80	14.80	9.50	15.78	0	99

47. Increase in # of CD ROM titles from 2001:

Number	Mean	Median	St Dev	Min	Max
73	1.16	0	3.14	-6	20

48 CD ROM expenditures in 2001

Number	Mean	Median	St Dev	Min	Max
63	$26055	$15000	29291	0	$128500

49. CD ROM expenditures in 2002

Number	Mean	Median	St Dev	Min	Max
71	$27181	$17000	29500	0	$125000

50. Estimated CD ROM expenditures for 2003

Number	Mean	Median	St Dev	Min	Max
71	$24913	$150000	28100	0	$135000

51a. Number of CDs cancelled & replaced by internet subscriptions:

Number	Mean	Median	St Dev	Min	Max
74	1.72	1	1.72	0	6

51b. Number of electronic products subscribed to in both CD and internet format:

Number	Mean	Median	St Dev	Min	Max
76	1.97	0	4.79	0	32

52. On average, how many hours per week does the Library staff spend on CD-ROM:

	N	Mean	Median	St Dev	Min	Max
Installation	48	0.27	0	0.71	0	4
Updating	51	0.40	0	0.80	0	4
Training	63	1.05	0.5	2.02	0	15
Coordinating with systems staff	62	0.90	0.50	1.35	0	8

53. Does computer system downtime adversely affect Library users because electronic publications have been substituted for print subscriptions?

	N	%
Yes	36	41.4
No	39	44.8
Not applicable	6	6.9
Not answered	6	6.9
Total	87	100.0

54. Do you use a software package to track CD-ROM usage?

	N	%
Yes	77	88.5
No	7	6.9
Not answered	4	4.6
Total	87	100.0

- built in the CD ROM tower software
- I don't know systems does the tracking
- non-standard, developed in-house by IT

INTERNET USE
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55. Do you currently use the internet?

	N	%
Yes	87	100.0
No	0	0.0
Total	87	100.0

56. How often do you use the internet for:

	Never		Occasional		Regular		Not answered	
	N	%	N	%	N	%	N	%
E-mail	3	3.4	3	3.4	79	90.8	2	2.3
Reference	0	0.0	4	4.6	82	94.3	1	1.1
News	1	1.1	21	24.1	64	73.6	1	1.1
Legal research	0	0.0	12	13.8	75	86.2	0	0.0
Ordering	6	6.9	36	41.4	45	51.7	0	0.0
Cataloguing	16	18.4	32	36.8	36	41.4	3	3.4
Interlibrary loan	9	10.3	44	50.6	33	37.9	1	1.1

- current awareness
- non-legal research - regularly

56. Internet searching capability:

	N	%
Available on Library standalone PC(s) only	0	0.0
Limited to selected users' desktops only	5	5.7
Firm-wide, available on all desktops	82	94.3
Total	87	100.0

57. Who provides Internet training?

	N	%
Library staff	55	63.2
Research Lawyer	4	4.6
Information technology department	37	42.5
Consultant	2	2.3
None	23	26.4

58. Are practice-specific Internet training sessions provided?

	N	%
Yes	25	28.7
No	62	71.3
Total	87	100.0

59. Do you subscribe to any pay for use websites?

	N	%
Yes	42	48.3
No	42	48.3
Not answered	3	3.4
Total	87	100.0

List of pay per use website subscriptions:

- American Soc. Corp Secretaries
- Bankruptcy Daily News, Encyclopedia Britannica, Hoovers, Indexmaster, Index to statutes, Oxford English Dictionary [OED], VC reporter, CDN & ONT. Citator Service
- Bluebook of Canadian Business, QP source, Canadian Journal of Law & Technology, Taxnet Pro., Taxworks
- C. Corp. Bill.
- Canada Stockwatch, MERX, Maritime Law Book, Infomart, AG Canada, Brownstone's Commercial Leasing & Management Toolkit, Chronicle of Higher Education, Municom, CCH Online, Dun & Bradstreet, Education Law Infosource, HeinOnline & others !!
- CCH, Gaudet, Gazette Officielle du Quebec
- CIOHS , LegalTrac, CancorpWeb, Manitoba Statutes, Energy Analects, Oil & Gas Journal, Daily Oil Bulletin, PEPS QP Source, Tax analysts treaties, Knotia FP Proflier
- Consumer Reports, Electronic Library
- Corporate Registry - Cores, Equifax Searches, SEDAR, Sedi, ACOL, Land Filter Searches PPR Searches
- DLR Plus, CPR Plus
- DJ Interactive, New York Times, Infomart
- Dow Jones
- Dow Jones, Infomart, LivEdgar
- DRI-Experts, Maritime Law Book
- Factiva, Quickfind, Westlaw
- QP Source, Quicklaw
- HR Online, CHRR, Dow Jones. NEJM, MLB
- Ingenta, Harvard Business Review
- ITPA
- Maritime Law Book
- Maritime Law Book, QP Source
- Medical matrix
- Natural Resource, CCH legislative Pulse
- Negotech
- NS Dept of Labour databases, NS Geomatics, Saegis
- only for personal uses (e.g. Wall Street Journal, pd for by lawyers)
- Press and the Courts
- QP LegalEze
- QP LegalEze (BC gov't legislation), Westlaw-eCarswell, Securities Mosaic
- QP LegalEze, CLE Case Digest Connection
- QP LegalEze, Canada Stockwatch and many others
- QP Source
- QP Source
- QP source Alta, LegalEze BC
- Canada Stockwatch
- Canada Stockwatch
- too many to list
- VC Experts
- Westlaw-eCarswell, Lexis.com, Infomart.ca, and many more
- Westlaw (US caselaw), CISTI, Maritime Law Book

LIBRARY DATABASES

60. Software used for Library catalogue & databases:

	N	%
Catalogue not automated	6	6.9
DBase	0	0.0
Eloquent	2	2.3
Inmagic DB/Textworks	35	40.2
Web publisher	13	14.9
Inmagic/Inmagic plus	6	6.9
Folio	0	0.0
Infocat	0	0.0
Navigator / Explorer	0	0.0
Sydney / Sydney Plus	6	6.9
Other	19	21.8
Total	87	100.0

Other software includes:

- Ad Hoc
- CASPR
- Docs Open
- Dynix - Horizon [2]
- Ergonet
- Filemaker Pro
- Imanage
- In house built web database / In house creation [2]
- ISYS
- law library data mgr
- Library Works (catalogue)
- Lotus Notes
- Microsoft Access / MS Access [3]
- MS Word
- PC-File
- Summation Blaze
- switching to Dynix 2003
- switching to Eloquent [from DBTextworks]
- Unicorn from Sirsi Corporation

61. If your firm has more than one location with more than one library, is the library catalogue:

	N	%
Separate for each location	19	21.8
A union catalogue	18	20.7
Separate catalogues, but searchable from each location	11	12.6
Not applicable	23	26.4
Not answered	16	18.4
Total	87	100.0

62. Are serials check-in records maintained:

	N	%
Manually in print format	16	18.4
Electronically, in a library database	64	73.6
Check-in records are not kept	6	6.9
Not answered	1	1.1
Total	87	100.0

63. Software used for Library databases – other than the catalogue

	N	%
No library databases	23	26.4
DBase	0	0.0
Access	9	10.3
DB/Textworks	30	34.5
WebPublisher	8	9.2
Other	12	13.8
Not answered	5	5.7
Total	87	100.0

Software used for library databases:
- DB/Textworks for Legal memos
- Dynix - Horizon
- MS Excel
- Filemaker [2]
- Folio-Memos Db
- HTML-intranet
- Imanage
- ISYS
- links 2.0 Gossamer threads
- Lotus Notes
- SQL
- Summation Blaze
- Word/Hummingbird
- Worldox for Research

64. Does the Library maintain a database of legal memoranda?

	N	%
Yes	43	49.4
No	40	46.0
Not answered	4	0.0
Total	87	100.0

64A.

	N	%
Firm has NO legal memoranda database	11	12.6
Firm has legal memoranda database, but it is maintained by…	27	31.0
Not answered	49	56.3
Total	87	100.0

Non-library managers were:
- Director of Research
- In process -- nothing as yet in our office
- individual practice areas' associates
- IT - within GroupWise
- IT Department [2]
- IT Department + Research Lawyer
- Knowledge Management / KM Dept [2]
- Knowledge management Secretary
- Knowledge manager (lawyer)
- Labour group
- Lawyers responsible for saving memos into database; use Docs Open at present
- Librarian
- paralegals
- practice groups and paralegals
- Precedent Lawyer
- Quicklaw
- Research Dept [2]
- Research Lawyer & secretary
- Research Lawyer [4]
- Research lawyer using document mgmt system
- Secretary
- Specific practice group
- Research Lawyers
- Research staff

65. Who indexes the legal memoranda for the database?

	N	%
Librarian	28	32.2
Research lawyers	16	18.4
Authors of memoranda	8	9.2
No indexing; full text is searchable	17	19.5
Not applicable	7	8.0
Not answered	11	12.6
Total	87	100.0

66 What software is used for the legal memoranda database?
- InMagic [4]
- DB/Textworks / Inmagic DB/Textworks [16]
- DB/Textworks (not Web Publisher version) [1]
- Inmagic DB/Textworks with WebPublisher [2]
- Developed in house
- Document Management software (in-house)
- Document Management software
- Firm's document management system
- Docs Open [9]
- PC Docs [3]
- Worldox [2]
- Ergonet
- Powerdocs & abstracts, Full text & abstracts
- Filemaker
- Folio

- Folio 4
- GroupWise, document filed
- HTML-intranet, on internet, Explorer
- Imanage   [5]
- Portal - Imanage
- ISYS   [4]
- Gossamer Threads Links 2.0
- Lotus Notes
- MS Access / Access   [2]
- not decided yet
- Not really a database - just stored on network by file #
- Pandell [Liquid Intelligence]
- Private Quicklaw database / database on QL   [2]
- Prolaw
- Sonar
- Summation
- Summation - old,   Worldox - new
- ZyImage

FIRM INTRANET

67. Does the firm currently have an Intranet?

	N	%
Yes	55	63.2
No	22	25.3
Not as yes, but the firm is working on one.	10	11.5
Total	87	100.0

68. If your firm has an intranet, it can be described as:

	N	%
Under construction / Primitive	11	12.6
Completed, but first generation	16	18.4
Second generation	24	27.6
Third generation or later	12	13.8
Not answered	24	27.6
Total	87	100.0

69. What is the librarian's responsibility re firm's intranet?

	N	%
Webmaster	9	10.3
Prepares firm intranet content	12	13.8
Prepares & updates Library webpages	41	47.1
Prepares Library webpage content (no HTML)	22	25.3
other	12	13.8

Comments:
- assists with content only
- assists with design of whole firm Intranet
- gives suggestions to systems staff
- initiating the project

- internet reference links
- maintains collection of links; coordinates local portal content
- monitors changes to links & notifies systems with updated links - suggests research links
- none
- on National Intranet team + responsible for management of content for local office
- Practice pages for lawyers
- sometimes asked to prepare content for a project

70. Does your firm use content management software for updating your intranet?

	N	%
Yes	15	17.2
No	40	46.0
Not Answered	32	36.8
Total	87	100.0

71. What content management software do you use?

	N	%
WebPublisher Interactive	3	20.0
Microsoft Content Management Server	5	33.3
Other	7	46.7
Total	15	100.0

Content management software:
- Dreamweaver -moving to Red Dot
- Imanage
- In house system
- Macromedia Contribute
- Microsoft Front Page
- proprietary solutions

72. Is the Library catalogue available on the firm's intranet?

	N	%
Yes	35	40.2
No	28	32.2
Not Answered	24	27.6
Total	87	100.0

73. Are any other Library-created databases available on the firm's intranet?

	N	%
Yes	23	26.4
No	35	40.2
Not Answered	29	33.3
Total	87	100.0

Other Library-created databases, included:
- closing documents
- current awareness
- decisions disciplinaires
- experts collection, internet links database, practice group research database
- Fed/Ont Bills, Tax Opinions, Report Books
- Firm Directories, Policies
- Firm Newsletter, Proposals, Emissions Trading
- Legislation database
- Library Services, Cat + Memo+ Decisions Abstract
- list of unreported cases held in library files
- Many
- memo, expert
- memobank / Memoranda of Law [4]
- NetLinks (internet links); an index for a firm newsletter
- Not appropriate it is a departmental library
- Other office catalogues, bookmarks, links
- Referrals DB; Directory DB; RFP DB; Memos DB; Model Docs DB; Wrongful Dismissal DB; Professional Development DB; FHP DB; Client File DB (Client specific memos)
- Research memos [2]

74. Is the librarian a member of the firm's intranet committee?

	N	%
Yes	26	29.9
No	15	17.2
Firm has no intranet committee	24	27.6
Not Answered	22	25.3
Total	87	100.0

75. Does your firm subscribe to any "push" technology titles?

	N	%
No	34	39.1
Yes	27	31.0
Not Answered	26	29.9
Total	87	100.0

- all Novascotia.com
- AWLD
- CCH
- CCH / CCH Online Daily Taxworks / CCH Protos / Protos / Taxworks Protos [11]
- CCH securities
- CLE Case Digest Connection [CDC]
- CLE of BC Email update (free)
- ESSA newsletter
- Gallen
- Infoglobe watches
- Insurance Day
- Knotia (CICA) [2]

- LivEdgar watches
- Novell
- QP LegalEze
- Reports from Carswell etc.
- Securities Mosaic (news)
- Tax net pro / Taxnet daily / Taxnet Taxpro / TaxNet. Pro's push email to tax group [10]
- Tax titles from various publishers
- Too many to list [4]
- TSX updates

LIBRARY MARKETING

76. What does the Library do to market its services within the firm?
- activities on ISLD; annual book recall; visible participation during fundraising events; library newsletter; promotional email messages
- alerts interested parties to new titles that have been purchased
- all our clients are outside our organisation - we use Bar Journal, Legal magazines, general mailing, conventions, etc
- annual library open house
- attend lawyers meeting- provide report
- attend practice group meetings to discuss activities in library, monthly newsletter produced
- attends luncheons within the firm. Delivery of new items
- bootcamp training sessions
- brief e-mail updates, practice group updates
- bring in some sort of food and information related display on ISLD
- communications in internal firm newsletter, departmental meetings
- conducts workshops for user groups, get involved in deals, first choice for info, fastest most cost effective, offers services before asked
- current awareness
- current awareness services, new on QL, Bankruptcies Daily, Legislature Update, Securities/Corporate Update, Litigation Update
- Daily Bulletin, special events, attendance @ practice group meetings
- firm newsletter created by me, includes not just library news but firm news too.
- give lunch + learn seminars; be visible; participate in firm events; write for legal journal; serve on firm committees
- holds training sessions of various kinds for various audiences
- information package to new lawyers & all students. New intranet library page to have News "box". Regular emailing to lawyers & students re; updates, new titles, etc.
- ISLD, personal service, personal instruction
- Librarian attends NPG meetings, Library Day (Annual)

- librarian conducts lunch and learns on grammar, proofreading, citations for staff and on research for students
- library brochure, library tours & orientations for new lawyers /students
- library intranet pages, Library "logo "on all route slips, etc, rapid turnaround for ref Q's
- lunch and learns, open house on ISLD, email announcements, newsletter
- lunch and learns; Handouts; library tours
- luncheon information sessions
- N/A / nil / none / nothing / not much [9]
- newsletter
- newsletter, intranet, broadcast emails
- no activities, I did contribute a list of services to the Office Procedures Manual for the support staff
- none other than email, announcements re new activities
- occasional contests. bookmarks for completing intranet training, e-mail reminders with news and new services
- occasional emails
- open houses, proactive email newsletter
- orientation for every new lawyer, Invitations/activities for new products, emails sent to groups of lawyers
- pamphlet, web/intranet, newsletter, archives/marketing
- pamphlets; involvement in student training and orientation; firm wide info sessions
- provide instruction for electronic searching, advertise intranet, advertise various uses of catalogue
- provides excellent service
- recent acquisitions *something illegible* on intranet
- regular lunch and learn training sessions on a bimonthly basis
- research/training seminars, promotional materials (pens, stress balls, slinks)
- training - at your side and group, amnesty days w/candy, presentations to practice groups
- Training Sessions, Current Awareness
- use of email
- very little in the last 3 years
- we don't market the library; we sell ourselves by providing reference and training
- weekly "20-minute workout" research training sessions for lawyers/students
- weekly newsletter
- when I began, I interviewed all of the lawyers about their information needs + tailored services to them accordingly

FIRM WEBSITE & EXTRANET

77. Does the Library play a role in creating/updating the firm's INTERNET WEBSITE?

	N	%
No	58	66.7
Yes	28	32.2
Not Answered	1	1.1
Total	87	100.0

Comments:
- add/suggest content
- advise and implement sources for research
- content as relevant
- done in our main office by director of libraries for the firm
- at present I am training to be able to update website
- Knowledge Service Director (librarian) develops & manages all web initiatives. KS also indexes all article into KM databases for use on Intranet and website
- librarian informs website committee of items of interest I.e. case law, articles, reports
- librarian is a member of committee
- librarian on Technology Committee, reviews web pages and provides suggestions
- library manager is co-webmaster with marketing manager; member of firm website committee
- not done locally
- one library staff member works half- time as Web Content Coordinator
- provide content for "news" section
- provides updates to lawyer's case lists
- recommends links, assists with content
- recommend links for other websites
- send material to webmaster, monitor firm for changes
- the links are the library's responsibility
- the website's homepage is the library's catalogue and most used services
- updates website
- updating content
- used on special projects to develop content or to write as my writing skills are superior
- webmaster; "What's new in the law"; librarian is on the website development team

78. Does your firm have an EXTRANET?

	N	%
Yes	15	17.2
No	68	78.2
Not Answered	4	4.6
Total	87	100.0

79. What is the library's role in the EXTRANET?

	N	%
None	10	66.7
Yes	4	26.7
Not Answered	1	6.7
Total	15	100.0

Comments:
- provides content
- library services available websites of interest for research & legal
- creator and content control
- planning extranet - library/KS will be involved in development & content selection
- we provide some client content

TECHNOLOGY PLANNING

80. Are Library needs included in the firm's technology plan?

	N	%
Yes	57	65.5
No, librarian not consulted	24	27.6
Not applicable	5	5.7
Not Answered	1	1.1
Total	15	100.0

KNOWLEDGE MANAGEMENT

81. What role does the Librarian play in the firm's knowledge management initiatives?

	N	%
Leadership role	9	12.6
Contributor	41	47.1
On-knowledge management committee	18	20.7
NOT on knowledge management committee	32	36.8

82. What role does the Librarian play in the firm's PRECEDENT bank development?

	N	%
Leadership role	5	5.7
Consultant	27	31.0
NO involvement	48	55.2
Not answered	7	8.0
Total	87	100.0

FIRM MERGERS

83. Did your firm merge in the last 5 years?

	N	%
No	58	66.7
Yes	25	28.7
Not answered	4	4.6
Total	87	100.0

84. What is the structure of the library administration:

	N	%
Hierarchical	5	20.0
Peer-to-peer	13	52.0
Hybrid	4	16.0
Not answered	3	12.0
Total	25	100.0

85. Does the merged firm have a union SERIALS list?

	N	%
Yes	11	44.0
No	13	52.0
Not answered	1	4.0
Total	25	100.0

86. Does the merged firm have a global MEMO bank?

	N	%
Yes	7	28.0
No	16	64.0
Not answered	2	8.0
Total	25	100.0

87. Is the firm's INTRANET?

	N	%
Merged completely	12	48.0
Separate for each location	2	8.0
In the process of being merged	5	20.0
Not answered	6	24.0
Total	25	100.0

88. What library functions have been centralized?

	N	%
Collection development	6	24.0
Acquisitions	6	24.0
Cataloguing	6	24.0
Resource sharing	9	36.0
Current awareness	9	36.0
Other	3	22.0

- business development/client team research
- routing
- some contract negotiations

89. Is the library budget prepared?

	N	%
Separately, by location	18	72.0
Nationally / centrally	4	16.0
Hybrid	1	4.0
Not answered	2	8.0
Total	25	100.0

90. Are library budget account codes / ledger codes:

	N	%
Separately, dependant on location	11	44.0
Standardized, using national codes	12	48.0
Not answered	2	8.0
Total	25	100.0

Comments

1. Marketing: keep finger on the pulse, follow client stories, political stories. Make everyone aware of library contribution to research. Be first choice in a panic, be a player for clients and staff. Not just for lawyers. Always deliver - the essence of good marketing strategy.

2. 1. Thanks for doing this!
   2. For next survey: % time allocated to: a. Training users b. Locating answers c. Keeping up with changes in info products.
   3. What are your library's major challenges?
   4. Library System - which of these activities are automated? - serials, - acquisitions, - circulation, - ILL?

3. 1. Questions on Budget: I could not remember exactly how many titles I have cancelled over the last three years exactly, perhaps a % is better here.
   2. We have periodicals in our reception area that the library manages - i.e. budgets for. Does anyone else?
   3. Committees: I would like to know more about the committees that librarians participate in - both in and outside the office.
   4. Training: do librarians teach legal research courses in their firms or do they prepare research manuals etc?
   5. Students: Do librarians participate in student reviews?
   Thanks, these results are excellent resources!

4. Question 22: are you referring to the amount of time actually billed to clients for the librarians' time or the firm in general? I believe that a higher proportion of my time is billed than that of lawyers, students, electronic charges etc.
   Question 32, the library pays for some personal copies of books, other personal copies are paid out of the lawyers' discretionary funds, i.e. by the firm.
   Question 61: we have a Union catalogue in our main office but have not managed to give access to it to our branch office. The branch office has a separate catalogue of its own.
   Question 65: the most success we have in the indexing memos is when the articling and summer students do it. It is a very useful exercise for them to read how memos are written and how research is done.
   Question 76: The Marketing of library services is a struggle for me. I find it difficult to come up with ways to get our lawyers' attention without annoying them. Obviously, different lawyers are receptive to different approaches.

5. Some of the questions were awkward to answer as they didn't take into account one person, part-time, corporate librarians

6. The firm described in this survey is a labour law/employment law firm of 20 lawyers. Automation is proceeding but intranet has not as yet been approached. Docs Open implementation has just begun. Library catalogue or at least CLE holdings to come online shortly. Firm does publish electronically + has a dynamic website

7. CD's and Rocky Mt. Mineral renews every 2 years. Library Newsletter - paper reduction, we use firm intranet and firm communication vehicle of Daily Bulletin to announce items of interest, newsletter has become "organic" because of firm intranet. We have just signed up for -WleC and will be canceling our topical reports as well as canceling some CD's. We hope by the end of 2003 to reduce CD's and paper dups. further depending on the performance of the WleC. Also, billing of WleC is something the firm is still grappling with. We are making lawyers aware of the transactional pricing providing usage reports to Practice Group leaders and letting billing lawyers evaluate first. We'll know more once the training initiative is completed. Sigh...

8. Note for Q30: 45 titles have been cancelled temporarily. New contents will be ordered periodically. Maybe this should be included as a question "suspension of titles". Also, new titles are added which torch "suspending" titles for budget reasons.

9. This is an extremely valuable survey particularly the "cost per lawyer" information which is what law firm administrators always refer to and require when reviewing budget requirements.
Question 13: I presume means in addition to the library staff.
I found Q9 rather difficult to answer correctly for several reasons. I am a qualified paralegal with over 20 years experience working in law libraries (graduated from college in 1985). My title is "Library Manage". I work 23 hours a week with a library clerk who works 20 hours per week. We have 30 lawyers and 5 paralegals and 5 students in a private law firm.
Congratulations to the survey team on a job well done.

10. by "library users" do you mean <u>actual</u> library users or only potential library users?
I would be surprised that even in the biggest firm there are more than 100 users??

11. Could have used more room for some of my comments; not sure how best to handle that. Perhaps some direction on what to do at beginning of survey?
Perhaps time to include more open questions as to what other responsibilities library staff are taking on? e.g. corporate file records, corporate archives. Yesterday I was asked if I could catalogue the firm's art collection! Not sure what will come of that, but perhaps some of our colleagues do that already,
Question 19 re: billing - I think the ranges might need to be increased next time,
Question 14 re: routing tables of contents to lawyers - we have immediate plans to discontinue photocopying and start scanning to electronic. Would be interesting to know how people are scanning tables of contents to electronic. We are testing out the new type photocopiers that scan into .PDF documents, for example.
Questions 26 & 28: I wasn't sure whether or not to include cataloguing. I excluded it.
Thank you - very thorough survey; I look forward to the results!

12. There is no question regarding vacation coverage when the Librarian (Primary) is away. It would be interesting to see if some firms hire a temporary or contract Librarian during a Librarian's absence.
Are there any libraries that have regular admin. support (e.g. entering timesheets, sending faxes and general clerical/secretarial support)