

In December 2004, the Holland Hart LLP law librarians, located in Denver, decided that collecting statistics was the only way to prove our worth to firm management. Many other administrative departments within the firm were getting significant staffing increases, and I needed something to show management that we needed more staff.

Our billable hours did not reflect the amount of work we got done. We had three professional librarians supporting the firm's research needs; this staff level had been in place for 15 years. Meanwhile, the firm increased the attorney count by 100 for the last five years for a total of 300 attorneys, which significantly impacted the amount of research requests we received. I decided the best way to gather some data to show management a true picture of our contributions and work level would be to track the reference requests.

Before You Begin Collecting

When a decision is made to implement a statistics program, it is important to have the support of the staff. The staff will have to add another task to their workflow and be diligent about recording the statistics. It is an all or nothing task—collecting just a few statistics doesn't really help.

In order to be effective, you must commit to collecting statistics for a period of time that will provide enough data to work with. Ideally, collecting statistics should be part of the everyday workflow. At Holland Hart we have been collecting reference statistics since 2005.

Another important aspect of implementing a program of this type is to determine what types of statistics should be collected. There are many types of statistics: reference, technical services, circulation, computerized research recovery, billable hours, other electronic usage, etc. Determining what needs to be collected in order to support the desired outcome is the most important part of this program.

After investigating some options for tracking our reference statistics, we decided to make it as un-intrusive as possible. Using Excel, we created a key for what we wanted to track and kept it as simple as possible (see "Sample Key for Tracking Statistics" on page 10). The key included the following information:

- date
- type of requestor (partner, associate, or staff)

- type of request (legal, business, public records, non legal, or marketing)
- practice group
- billable or non-billable
- office location of the requestor
- librarian who completed the request.

All of this information was recorded using multi-letter codes put into the correct column, which allowed for quick data entry. Once the library portal went live, we added an additional column to track requests we received from the portal. We used formulas in Excel to get monthly totals for all the above data sets.

Analyzing Data

Once we started entering data, we saw some trends that we did not expect. We had assumed that the associates used us the most, but it was the partners who sent us the most requests. We also were now able to determine which other offices, besides the main office, used our services and which did not, based on the number of requests we got from them.

Our final totals for 2005 were 4,380 reference requests completed/fulfilled by three professional librarians. Using the information from our statistics, I presented a memo to the budget committee asking for one additional professional librarian position for the 2006 budget. After going back and forth, I was granted the additional position.

While analyzing the data in the fall of 2005, I could really see the limitations of Excel. It is a good collecting tool but not a great tool for presenting the data. The color coded charts that I tried to create for a memo to the budget committee could not display the data graphically the way I wanted to present it. This was frustrating and prompted me to keep my mind open to other options.

More Robust Software

In early 2006 I remembered that the firm's IT group had mentioned that the software system it used for tracking the help desk calls might work for some type of library tracking. After seeing a demonstration, we worked with the HEAT (www.frontrange.com/ProductsSolutions/Detail.aspx?id=40) expert in our IT group to get the intake template customized for tracking research requests. This process involved the whole

reference team—we all had input into the creation of the intake screen.

Our goal was to incorporate this into the workflow without too much additional time or disruption, which involved deciding what we should track and what we would like to add. HEAT is very customizable. We decided to continue to track everything we had been recording in the Excel spreadsheet with a few additional data sets.

HEAT is already set up to record who makes the request—it pulls the basic employee identifying data from the HR computer system. We set up the e-mails that came to our internal library research e-mail address to automatically populate into HEAT. This allowed us to minimize the amount of data entry we had to do, although we still had to manually enter any request that we received via phone or in person.

When we used Excel, we did not capture the actual request. The addition of this data also allows us to use HEAT as a reference knowledge database to refer back to. We also set up some of the other tracked items in a way that did not interrupt

workflow or take too much time to complete. Using drop down "pick" lists, we added many more details about each request. We now track more types of requests than before.

We added the name of the resource(s) we

use to resolve the request, as well as client billing information, and we fill out the resolution section as if we are inputting it into our time billing system. This allows for a quick cut and paste into the time billing system so there is not any duplication of work. We track which internal departments use our services and how much time we spend fulfilling those requests. We went live with HEAT for our reference statistics in March 2006.

The best part of HEAT is that I can slice and dice the data any way I want. HEAT uses Crystal Reports. Working with my IT person, I set up specific library reports. Some of the most critical reports were:

- number of requests per month/year
- non-billable vs. billable request by requestor
- number of requests per office.

Once I had this tool, I was in statistic reporting heaven. I always had an impressive

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statistic at hand to use in my elevator speeches and at management and practice group meetings.

Review and Re-Evaluate

It is important to routinely review your statistical results, collection methods, and needs. I re-evaluate the statistics quarterly and run monthly reports. I am constantly thinking about the pieces of data available and how I can layer them into the reports for the most impact.

Recently I asked IT to create a report of all the attorneys not using our services. Every person in the firm has at least one recorded IT help desk call in HEAT, so the IT department took the data set from the help desk call database and ran it back through HEAT, extracting the names of the attorneys who did not show up in the library services part of HEAT. The list that was produced was surprisingly small—only 40 attorneys had not asked us a reference question. Based on our statistics we made adjustments to our staffing schedules and produced guidelines that we sent to the attorneys on how to use the reference services more effectively.

We interviewed for the new position in early 2006, and the new librarian started in June 2006. We were fully staffed and using HEAT to track our reference statistics. Initially I decided not to request any

additional staff for the 2007 budget, even though our requests and expertise were at an all-time high; the firm added two additional offices in 2006 and another 20 attorneys.

By the fall of 2006, we were swamped with reference. Internal departments (marketing) used our expertise even more, and the attorneys relied on us in record amounts. October was the second busiest month for the whole year. Concerned about my staff and their ability to maintain their sanity along with the excellent customer service they provide, I decided to once again request an additional professional librarian position for 2007. This time I had better reporting capabilities and even more statistics than before.

The single most effective statistic that I used was the amount of reference we completed; we answered 5,500 requests in 2006. When comparing this number to 2005 totals, it translated to two additional months of research, 26 percent more than we had in 2005. This was the deciding factor for management, and I was again granted a librarian position for 2007.

Future Plans

We filled the new position in March 2007. There are three other internal departments at Holland Hart LLP now looking at using HEAT to track some type of statistics unique to their departments. The library

department's 2007 statistics are on track to increase 17 percent from 2006.

Future plans with HEAT include tracking copyright compliance for our requests; tracking CLE requests (Colorado is a home-study state); recording more specific data in regard to marketing/RFP proposals, for which we perform research/competitive intelligence; and using the statistics to start populating our other offices with professional librarians. We hope to take the data and perform a year-to-year comparison for staffing needs and training opportunities. We will also use the data as a starting point for our marketing efforts to the other offices and practice groups.

When we started to collect statistics I had no idea how successful we would be in getting the additional staff that we needed. I am a firm believer and will continue to use statistics anywhere I can to help the library department get the resources needed to get the job done and support the attorneys and their clients. We have recently purchased and installed Onelog, and with that additional tool we will be able to produce usage statistics for our electronic resources. This will only continue to help the library department prove its worth to management. ■

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Sample Key for Tracking Statistics

WHO

PartnerP
 AssociateA
 ParalegalL
 StaffS

BILLABLE

YesY
 NoN

WHAT

LegalL
 RetrievalR
 Public RecordsPR
 Other NonLegalNL
 BusinessB
 Short/DirectionalSD

WHERE

AspenAsp
 BoiseBoi
 BillingsBil
 BoulderBou
 CheyenneChey
 CspringsSpr
 DenverDen
 DTCDTC
 JacksonJack
 Santa FeSFe
 Salt Lake CitySLC

PRACTICE GROUP

Business Group

BankruptcyBank
 Broadband TransactionsBT
 Business EntitiesBE
 Corporate FinanceCF
 Employee BenefitsEB
 FinancialFin

Patent ProsecutionPP
 Trademark and CopyrightTC
 Project DevelopmentPD
 Real EstateRE
 Tax and EstatesTE
 Technology TransferTT

Litigation Group

AppellateApp
 Business LitigationBLit
 Government Investigations
 and White CollarWC
 ConstructionCon
 Intellectual PropertyIPLit
 Product and Insurance DefensePI
 TortsTort
 Labor and EmploymentLE
 EnvironmentalEnv

Resources Group

Environmental ComplianceEC
 Energy and TelecomET
 MineralsMin
 WaterWat