

WHEN STATISTICS

BACK

HOW STATISTICS CAN WORK AGAINST YOU—AND HOW TO HANDLE IT

By Christine M. Stouffer

We've all heard the mantra: Get metrics! After all, numbers tell the story.

Librarians have all begun to think more like business people and that includes collecting statistics. Many law libraries have sophisticated statistics-collecting programs, while others are more basic. No matter what the means, it seems that every library collects statistics based on claims that metrics save jobs and increase the profile of the library.

But what if those eye-popping statistics backfire? What if your very honesty in providing statistics raises doubts about your department's work or value? It may be hard to conceive, but this could happen. Rather than wringing our hands or tossing out the statistics with the proverbial bathwater, let's figure out how to confront this phenomenon. In these increasingly austere times, libraries must sort out and communicate their reasons for existence, and that

extends beyond offering proof by numbers alone.

Scenario

Law firm X has a bustling library services department. They are forerunners in setting up access to reference services through a variety of technological services; their portal is chock full of links and useful shortcuts; their competitive intelligence research is beyond reproach; their training and support of new associates, partners, and laterals is stellar and constantly complimented in end-of-year reviews. Of course, they keep phenomenal statistics in a smart, electronic format.

Suddenly, there is a global economic downturn. Every department in the firm is scrutinized. Law firm X's library director is asked to prepare an analysis of her department and dutifully writes a report replete with statistics to make one's hair stand on end. And these are real statistics—no puffery here. The

director even thinks her report demonstrates that the library could use two or three more full-time librarians.

Then firm management responds with their analysis: Why is the library doing so much competitive intelligence research anyway? Shouldn't department Z be doing that? Why is the library supporting associates to this extent? Maybe the library should not answer any questions from lawyers unless they are partners and let the associates do their own work. Why doesn't the library cut back or automate some of the routine news or alert analysis they are doing for client development? And so on.

The law library director feels sucker-punched. After spending so much time collecting statistics, she has now provided firm management with ammunition in the form of real numbers to downsize her department. How can we change this picture?

The first step is to be prepared to respond on a deeper level than what all



those blinding statistics can provide. The value of the library, researchers, and staff must be clearly articulated in a convincing argument, complete with practice points and concrete results for the firm's reputation and bottom line. Going forward, here is a suggested plan for when you are being challenged for recording your own good work.

Philosophy of the Library Mission Statements

Although this may appear to be a topic more suited for academic or conference hallway discussion, it is the foundation of your department's very existence within the organization as a whole. As such, librarians must have a very intimate acquaintance with their firm's philosophy and the library's role within



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that framework. Have your library's mission and goals memorized and make sure you can present the short version any time and anywhere it is needed.

Mission statements vary depending upon the library environment. If you are an academic law librarian, you might stress the education aspect, not just for the student trying to survive law school, but for the future lawyer he or she will become. Public law libraries might focus on equal access to information as mandates of a democratic society. In a law firm or court library, the word "time" carries a lot of weight. Time can be billed, and lawyers and judges need to save time. This is a theme that can be used again and again, and it relates to nearly every aspect of a law firm library's work. Customer service is a growing area of law firm image and differentiation, so adopting a pro-customer outlook can be important to your mission. These are just starting points but they form the basis for your library's mission, and your mission is what should drive any statistics you eventually decide to keep.

Once you have your own version of a mission statement, meet with management (such as the library committee or partners) to compare notes. They will have their own idea as to the library's role and worth to the organization, but they will also look to you as the expert who will formulate the specific goals. It may be difficult, but you should work hard to devise a suitable mission statement and goals with those who manage your organization. What you are hearing from them is the sound of your future statistics taking shape.

Information Literacy

The exploding proliferation of websites, media, and the "executive summary" should be a welcome environment for the librarian or information professional. This is where we excel, where our talents and skills are best used. "What?" you may ask. "Can't lawyers and judges and law students use these tools on their own?" Yes, but possibly at their peril, and that is where the knowledge of the librarian as mediator and research partner becomes so important. Improving your own information literacy skills and figuring out ways that you can use those skills to find the right answers, educate users, and save time will provide value to your organization. If you can show the organization some specific examples of your own library staff or department making the difference, you are halfway home. Those are statistics that will be remembered in a positive way.

In a law firm setting, look at the ways you save time for the lawyers. Maybe you review news alerts on a daily or weekly basis, or post relevant news items to a portal or intranet. Perhaps you

update client or company information for the firm and have it available electronically for easy access to members of the firm. You might prepare an executive summary on a topic of interest for the firm or a trend in the legal industry so that each firm member does not have to digest every piece of information on the subject. This is value-added work that can help to attract or retain clients. It may even be quantifiable as a return on investment because you are saving the lawyers time better used on more lucrative tasks.

Statistics Done Right

Once the values of the firm and the mission of the library are clearly understood and articulated, the proper collection of statistics will naturally follow. Here is a method to determine how to use statistics so they do not come back to bite you.

Review All Library Processes

Every library has a lot of processes that are better left behind the scenes. You know the old saying about making sausage? That applies to much of the inner workings of libraries as well. Most organizational leaders have only a fleeting interest in these specific statistics—they would rather focus on a summary number. For the library manager, an ongoing review of library processes can help in a variety of ways, not the least of which is to streamline activity and create efficiencies. This can become habit-forming and show you are improving your department and, consequently, the organization's bottom line.

To fully evaluate the library's processes, you may want to review previously collected statistics if they are available. You may also be able to repurpose some activities to become more relevant in your new metrics reporting scheme.

Select Value-Added Tasks

In deciding which procedures or tasks to keep and count, focus on those that truly bring value to the organization. In a firm setting, you probably want to provide quality research at the lowest possible cost, save time for the lawyers, and deliver the results that are requested, plus add information or insight that the lawyer had not even thought about. Your library may do all sorts of other things to achieve these goals, but this handful of important tasks is what is ultimately important.

One argument that might be made by management is that the library should be more willing to "let technology work," which is sometimes perceived as a euphemism for "you don't need as many people." Crafting a response that shows how much you are already using technology, coupled with a minimal but necessary amount of staff time (in hours) is honest and informative to management.

Some positive, comparative "before and after" statistics between procedures will help, as will a few well-placed examples of errors made by other firm researchers when the library was not involved.

Collect Meaningful Statistics

Now you are in a position to select a group of important categories for which to keep statistics. Categories such as those below have proven successful in firms that I have seen, and they might be valuable to your library environment as well.

1. Time Spent by Library Staff

This is a category that is more easily understood and requires less explanation than "Number of Transactions," which is often split into many different types. At a basic level, it shows how the day is spent. However, it can be spun off to show how time spent by librarians reduces time spent by lawyers, including work done by lawyers that might be non-billable.

Librarian review of news is work in which many law firm librarians are engaged. This can include news specific to clients, industries, geography, law firm trends, or the like. It takes simple math to see that one library staff member reviewing these items and pushing them out to interested members of the firm is more efficient than 50 people spending time on this same task. The librarian's involvement removes duplicates or irrelevant items and complies with copyright regulations, thus sparing the time of everyone else at the firm. To any CEO, this would probably be regarded as a good allocation of staff time.

Another factor that is also legitimately countable but often overlooked is the human intervention involved in selecting appropriate resources, such as electronic databases, and then constructing effective automated searches for requestors. Librarians spend a significant amount of time trying out search strings, evaluating their success, tweaking them to reflect changes in industry trends, demographic stratification, or even the news and politics of the day. For instance, an impending flu virus could drastically alter the priorities of the pharmaceutical industry, and their legal counsel had better be informed of these changes. Although the end result is automated, thus making the behind-the-scenes work invisible to the end user, this is probably a time-consuming task done at regular intervals. So, in terms of library staff time spent to make it happen, it should be counted.

Meeting time for firm initiatives is another category you may want to consider counting. Perhaps your firm has a client-service initiative or a library-liaison program for committees, practice groups, or other firm-based activities. If librarians are spending time at meetings and doing follow-up work, include it

in your statistics as a strategic way to increase your department's visibility within the organization.

Processing time for technical services can be presented in a beneficial way by using comparisons. Don't toss out those old statistics. When you refine a process, compare how long a task used to take and how much time you have saved with a new procedure or piece of technology or equipment. You can use this to build a record of improvement over several years.

2. Requestor Type

This is a category that can truly reveal the breadth and strength of the librarian's reach. You can keep statistics based on category and name (i.e., lawyer, administration, marketing, faculty, committee, judge, etc.) that will reveal just how much impact you have on the organization. Even if the efficacy of providing these groups with information is later questioned, you have specific examples in case you need to go back to individuals to gain support.

3. Query Type

Counting by query type can become a hornet's nest. There is such a variety of work that is done in the typical law library that this can easily get out of hand. It is more effective to select a few major query types and then do your best to put your statistics into those broad categories. Management likely is not interested in

staff, you might want to rectify that situation before showing management the numbers. Otherwise, it might appear that you are perpetuating a technology that takes time to keep up and is not benefitting a large enough group of people.

Technology statistics also can demonstrate use of expensive electronic resources, which in turn is a way that you can show you are being proactive to control those costs. There are tools available that accomplish this task, and they can generate many statistics. But choose wisely because overload on this type of statistic has the effect of making everyone's eyes glaze over. This is too important an area to let slip by, however, and it is an area where management's negative perception of cost might come up and bite you suddenly. So being on top of the most important statistics of database usage is important; eschew the details.

5. Training Sessions

This can be used to counter some statistics that might come up under database usage. Keep statistics to show the number of training sessions you have facilitated or offered to lawyers or students on how to use expensive resources in a cost-conscious manner. Review your usage statistics to get the names of high-end users. Then target those users for remedial training and keep

dollars. You can include title or service cancellations, title swaps, borrowing versus buying, free electronic sites, free programming, enterprise licenses versus per-user fees, billable research time by librarians, staff time through streamlined processes, cost-effective online research by librarians versus comparable research by lawyers, switching vendors to get a better deal, and the like.

Clearly this is a difficult area for which to gather information. For some of your statistics, you may be able to keep a spreadsheet or system that is used throughout the year each time you cancel, swap, or convert a title. However, for others you will probably have to devise an intelligent form of estimating the savings, especially for situations when you are changing formats: the savings may not be "dollar for dollar" but can be realized when taking research time or loose-leaf filing time into consideration.

For management reporting purposes, it is probably best to present just a few figures in this category, but know that you can provide supplemental data on individual budget lines if necessary. Creativity in analyzing and presenting metrics for this category can be beneficial for the library.

Responding to Management Questions About Your Statistics

So let's say that you have already presented your statistics to management and are being questioned about what you are doing. How can you respond dispassionately but effectively?

The first rule is to take a deep breath and go back to look at the statistics you reported to management. Then be prepared to focus on only the most defensible metrics. Make sure that you are confident about what you are doing and how it is bringing value to the firm. This rationale trumps all the numbers and is your most powerful weapon. If you must, write a brief but succinct response that addresses each point of contention. For each challenge, use language to describe how all the numbers you presented demonstrate value added to the firm's work product. This will help put potentially negative statistics into a positive context.

Then agree to consider some of management's suggestions. For example, if a comment is made about eliminating some of the type of research you do, such as competitive intelligence, ask for a little time. Use the opportunity to study up on trends and then educate management. If a fair analysis shows that a task would be better assigned to another department or abandoned altogether, be willing to change accordingly and then put that time to better use in the library.

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“ REGULAR TRAINING OPPORTUNITIES ALSO DEMONSTRATE YOUR COMMITMENT TO KEEPING THE ORGANIZATION'S STAKEHOLDERS CURRENT ON TRENDS IN THEIR PRACTICE, AS WELL AS IN RESEARCH TECHNOLOGY. ”

parsing this category beyond a few general descriptors such as: company research or competitive intelligence, legal research, interlibrary loan, overall circulation of materials, and alerts. Some law firms engage in specialized work that might merit statistics, such as patents or deals researched. The same guidelines apply: know what is important to your organization and maintain library statistics accordingly.

4. Technology Used

This category can include number of hits on your portal or other links you have. By tracking these numbers, you can reevaluate the need for some links and retire those that are broken or rarely used. It can also point out where you are spending your time. If your statistics show that your catalog is only being used by the library

track of it. Regular training opportunities also demonstrate your commitment to keeping the organization's stakeholders current on trends in their practice, as well as in research technology.

6. Clients Served

In the law firm setting, some clients and matters are more library-intensive than others. It is valuable for management to know who those clients are, so maintaining library statistics by clients served might be important. It also helps to improve client service when you can help the lawyers anticipate their needs.

7. Money Saved

Last but not least is the Holy Grail—the firm's bottom line. Compiling statistics on money saved should be an annual exercise. Translate everything into

Conclusion

In a world of metrics, the effective librarian is well-advised to collect statistics. Consider carefully, however, the statistics to keep. Avoiding micro-statistics and too much library jargon can help you succeed. Likewise, a solid knowledge of why the library exists in the larger organization, including a well-developed philosophy or mission, is important. It can carry you through the questions of why you are doing what you are doing. Relying on the numbers alone will defeat you if you cannot offer valid reasons for the library's activities. Also, be willing to discuss what is worth the time spent and what is not. Take the suggestions and re-examine your initiatives and procedures. It is not a complete loss if you have to eliminate a task or relinquish a responsibility. If that happens, try to use any changes in your statistics the following year to show how you have improved in another area.

Time, money, and knowledge gained without sacrificing integrity and accuracy are worth demonstrating through the use of statistics. The key is to know in advance what matters to the organization and to tailor your work—and your statistics—to match those goals. ■

Christine M. Stouffer (*Christine.Stouffer@thompsonhine.com*) is director of library services at Thompson Hine LLP in Cleveland.