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Survey on Electronic Reference: A Briefs in Law Librarianship Issue

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Survey on Electronic Reference

A Briefs in Law Librarianship Issue

Written by
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Head of Reference
Louisiana State University Law Center Library

Electronic reference services in libraries have increased dramatically during the last five or six years as libraries and organizations have developed and improved their technology infrastructures. Almost all types of libraries now have e-mail access and can receive reference questions through that medium.

While some libraries plan for a careful implementation of electronic reference, others have been pressured to quickly implement such a service after patrons started e-mailing reference questions; assuming a service already existed. This assumption may have affected more corporate libraries than others; however, the description of electronic reference evolving from patron insistence on this kind of service is reported by many types of libraries.

For many law library patrons, electronic access to reference librarians offers clear advantages over traditional access via a reference desk and librarian. Convenience is a primary factor. Using electronic access, patrons may seek reference assistance from home or from around the world. Also contributing to the convenience of electronic reference is the patron's ability to make the reference inquiry at the time most appropriate for her.

Additionally, an electronic reference inquiry creates a record of that question. It may be that patrons who are forced to write out their questions are more precise and careful in choosing their words as opposed to those chosen

during a face-to-face encounter or a telephone conversation. Libraries report that electronic reference is popular with many of their patrons. Given the convenience factor, little analysis is required to determine why these patrons are enthusiastic about electronic reference services.

This survey set out to explore how law libraries are planning for, using, and promoting their electronic reference services. The questions posed concerned the extent to which law libraries are engaging in electronic reference, how they are implementing this service, and what impact the service is having on library organizations. For example, what percentage of reference questions are received electronically? Are reference librarians spending a disproportionate amount of time responding to electronic reference questions? Has the incorporation of electronic reference affected the traditional process of reference work? To what extent have law libraries altered their reference policies to accommodate electronic reference service? Many of these issues are addressed in this survey of a small group of law libraries.

INTRODUCTION TO THE SURVEY RESULTS

A survey of electronic reference was developed and distributed electronically in the Spring of 2000 to law libraries via the listserv for the American Association of Law Libraries' Reader Instruction and Patron Services Special Interest Section (rips-sis@aall.wuacc.edu), the Private Law Libraries listserv (privatelawlib-1@lawlib.wuacc.edu), and the listserv for State Court and County law libraries (statecourtcourtcountylib-1@lawlib.wuacc.edu). The vast majority of the 151 responses were received electronically, although a few were mailed.

A compilation of the survey responses follows this introduction. Questions from the original survey are in bold. For most survey questions, both percentages and raw numbers are included. In most instances, the open-ended responses to survey questions have been reproduced without substantial changes due to the potentially valuable or interesting nature of this information. Many times the original wording of a respondent's comment provides context or additional information which would be lost if edited into groupings of various categories.

For the most part, the responses from all library types are treated as a whole although there is some segregation of responses by library type. For example, the questions dealing with the percentage of reference questions received via particular media are broken out by library type. The tables displaying that information are located in Appendix One. Tables displaying

the percentage of staff time spent answering reference questions received via particular media are broken out by library type and displayed in Appendix Two. Although the survey requested that respondents submit a copy of their electronic reference policy, few policy statements were submitted. Those that were are included in Appendix Three. A selected bibliography of relevant articles about electronic reference is included in Appendix Four.

DISCUSSION OF RESULTS

No effort was made to engage in probability sampling whereby relatively few observations concerning the actions and opinions of a few law libraries could be generalized to a much wider population of law libraries. Basically, the data in this survey relies upon self-selected respondent's answers. The number of respondents, 151, was relatively low compared to the nearly 1800 law libraries that could have responded to the survey. Given these facts, the information produced from this survey becomes anecdotal. Only a very basic analysis of the information provided by these survey respondents is provided here.

Approximately half of the survey responses were from Law Firm Libraries (49.67%). The remaining half were fairly evenly split between Academic Law Libraries (23.18%) and Federal, State and County Law Libraries (22.52%). There was only one response from a corporate law library, and six libraries classified themselves outside of these traditional constructs. Over 95% of respondents work in libraries where there are seven or fewer librarians answering reference questions. Sixty percent of respondents work in environments where only three or fewer librarians answer questions. Of the libraries responding, 78.15% reported having a reference desk or some central point of service.

As a backdrop to the central focus of the survey, several initial questions in the survey concerned the handling of telephone reference. Eighty-six percent of respondents answer reference questions by telephone. Although 83.44% reported no separate policy for handling telephone reference, there were comments suggesting a lower level of service provided via telephone. See responses to question 7.

An overwhelming number of responding libraries, 88.08%, reported receiving reference questions electronically. Of the 11.26% that do not receive reference questions electronically, 78.95% reported no future plans to begin this practice. See question 10 for a list of some of the factors considered in reaching that decision.

An interesting range of responses concerning the advertisement of the

availability of electronic reference (see question 13) was received. Many libraries have not formally advertised their electronic reference service. Some libraries did not need to advertise it, as their patrons initiated the service. Other libraries reported various techniques for promoting the service, such as library newsletters, mentioning it in orientation tours, and publicizing it in various manuals and other internal publications.

One of the issues to be investigated by this survey concerned the extent to which law libraries engage in electronic reference. Question 11 asked for an estimated number of electronic reference questions received each week. These responses are broken out by library type. Law Firm Libraries responding to this survey handled the largest number; averaging 28.43 questions per week. Federal, State and County Law Libraries averaged 8.44 while Academic Law Libraries averaged only 4.45 per week. There was wide variation within library types. For example, several Law Firm Libraries reported averaging 150 electronic reference questions per week while one only averaged 2. The range for Law Firm Libraries was 148. The responses from other library types displayed a smaller range or distance separating the highest from the lowest value. For example, the range for Academic Law Libraries was 17.

Survey questions 14 and 15 addressed the percentages of reference questions received using various media and the amount of staff time spent on those questions. These numbers are more meaningful when broken out by library type. Tables displaying the break-out are located in Appendix One and Two. Although the reader should be reminded of the limitations of extrapolating any conclusions from this data due to the sampling methods used and relatively small sample, several observations can be made about the responding libraries. The numbers suggest that reference questions received face-to-face and via telephone in academic law libraries still comprise the vast majority of questions received. Seventy percent said that electronic reference questions only comprised 8% or fewer of their total questions. The amount of staff time spent answering questions was closely aligned. For example, it did not appear that library staff were spending an inordinate amount of time answering reference questions received via e-mail.

The responding Law Firm Libraries, however, appear to receive a higher percentage of electronic reference questions (also suggested by responses to Question 11). Seventy-six percent of those libraries reported receiving anywhere from 9 to 44% of their reference questions electronically. The percentage of staff time spent answering electronic reference questions was also commensurate with the percentage of reference questions received electronically.

The Federal, State and County Law Libraries participating in this survey displayed a wider spread of responses. Generally, when focusing on electronic reference, their responses fell somewhere between those of Academic Law Libraries and Law Firm Libraries. Again, this was also suggested by the responses to survey Question 11.

Another focus of the survey was the issue of institutional policy concerning electronic reference. Questions 16, 17, 18 and 19 addressed this issue. When asked about differences in policies, 81% of all survey respondents reported that their library has the same policy for reference questions received electronically that it does for those received face-to-face. Only 4.63% of respondents reported having a separate policy for electronic reference that distinguishes it from reference questions received face-to-face (see question 16). For reference questions received electronically compared to those received by telephone, 43% of all survey respondents reported that their library has the same policy for reference questions received electronically compared to those received via telephone. Only 3.31% reported a separate policy for reference questions received electronically compared to those received via telephone. Question 16 did not elicit the information being sought, however. The question asked each librarian to indicate all responses that were true. Therefore, the response results were evaluated against the total number of survey participants rather than isolating the responses and percentages within this question. The results suggest that the question was poorly structured and that some respondents were confused by the question, especially the question comparing policy coverage between e-mail and telephone questions.

The responses to Questions 17 and 18 suggest that three fourths of those respondents with a separate, specific policy concerning electronic reference treat those reference questions the same as reference questions received via telephone or face-to-face. Even among the respondents who have a separate policy, very few report treating reference questions received electronically either more restrictively or less restrictively than reference questions received in other ways. Question 19 was open ended and allowed respondents to explain policy differences. See the list of responses to question 19. Questions 16 through 19 could be interpreted to mean that there are at least some policy differences in the way that these reference questions are handled but that there may not be many formal or written institutional policy distinctions.

The survey also inquired about the responsibility for answering electronic reference within libraries and how the process was organized. In 57.72% of the responding libraries, the responsibility for answering electronic reference questions is shared by all the public services librarians. In 11% of libraries,

the Head of Public Services/Head of Reference is solely responsible. The respondents also described a relatively wide range (28.46%) of alternative designs for the responsibility of answering reference e-mail. See the differences in responses to question 20. The electronic reference questions are received directly by the staff member responsible for answering them in 34.15% of responding libraries. Another model existing in 28% of responding libraries is the distribution of the questions to an appropriate staff member from a central service point e-mail account. Again, however, a large group of responding libraries have alternative designs to facilitate this process. The practice appears very individualized depending upon the structure of the institution. See responses to question 21 for a list of those alternative arrangements.

Another issue the survey sought to explore was how law libraries treat electronic reference statistically. Although 60.75% of responding libraries treat electronic reference questions the same as face-to-face reference questions, 39.25% treat them differently. See the responses to question 22 for a list of some of those differences.

Questions 23 through 26 address the issue of how electronic reference has affected traditional reference work. Although 37.50% of responding libraries find that electronic reference has increased their workload, 61.72% reported that their workload remains about the same. See question 24 for a list of criteria upon which these responses were based.

About a quarter of the responding libraries, 26.77%, believe that electronic reference has made their job easier, while 27.56% believe their job is made more difficult by electronic reference. Almost half, 45.67%, believe that it has not affected the ease or difficulty of their job. This issue prompted a significant number of differing opinions. See responses to question 26.

Question 27 asked if any libraries planned to eliminate face-to-face reference. Only two libraries reported planning to do so.

A resounding 96.75% of respondents reported that electronic reference has been well received by their patrons. Extensive comments about this issue are listed following question 31.

CONCLUSIONS

Several general conclusions can be drawn from the responses of the group of libraries who answered the survey. Most of these libraries are receiving some electronic reference questions. Electronic reference is still a very small percentage of the reference work done by these Academic Law Libraries. The responding Law Firm Libraries engage in significantly more electronic

reference than the responding Academic Law Libraries, although it still accounts for less than half of their reference work. Responding Federal State and County Law Libraries engage in more electronic reference than Academics, but less than Law Firm Libraries.

Among institutions, there appear to be few policy distinctions between e-mail received electronically or questions received face-to-face. However, many respondents replied that they give different levels of treatment to questions received through various media. There appear to be few formal policy statements concerning the treatment of electronic reference questions. Very few policies concerning electronic reference were submitted in response to this survey. About half the respondents feel that electronic reference does not affect their workload while half feel that it either makes their job easier or more difficult, citing many reasons to support their belief. Respondents report that their law library patrons seem universally satisfied with electronic access to library reference assistance.

SURVEY OF ELECTRONIC REFERENCE

Introduction

1. In what type of library do you work?

Law firm library.	49.67%	75
Academic Law Library.	23.18%	35
Federal/State/County Law Library.	22.52%	34
Business or Corporate Law Library.	.66%	1
Other, please specify:	3.97%	6
— Non-profit Legal Aid.		
— Various interpretations of Federal/State/County.		

2. Is your library public or private?

Public.	34.00%	51
Private.	62.67%	94
Other, please explain:	3.33%	5
— Public, but only provide reference assistance to staff, not general public.		
— Public agency, but library not open to the public.		
— Not physically open to general public, but receives & responds to reference questions from the public via telephone, e-mail and letters.		
— Closed to public except by appointment.		
— Private law school, but public may use for research purposes.		

3. Does your library have a reference desk or other central point of service?

Yes.	78.15%	118
No.	21.85%	33

4. How many librarians field reference questions at your library?

1-3.	60.00%	90
4-7.	35.33%	33
8-12.	4.00%	6
More than 12.	.67%	1

Telephone Reference Questions

5. Does your library answer reference questions received by telephone?

Yes.	86.75%	131
Sometimes.	10.60%	16

Please explain when:

- Clients, members of the press, prospective clients and friends of the firm.
- Primary clientele (students or faculty).
- Primary clientele only (attorneys in the firm).
- Ready Reference type questions, time permitting.
- General questions only, no interpretation.

No.	2.65%	4	Please skip to question 8.
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6. If your library responds to reference questions received by telephone, do you have a separate policy for the manner in which these questions are handled compared to those received face-to-face?

Yes.	13.25%	20
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No.	83.44%	126	Please skip to question 8.
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7. If you have a separate policy for reference questions received by telephone, please explain the differences such as only ready-reference response to telephone inquiries.

- We provide essentially ready reference services via telephone. We will only provide directional help over the telephone to a lay person. If the individual identifies themselves as an attorney, we will do some preliminary searching and ask them to come in if the information provided is not enough.
- We don't have a formal written policy. The practice, generally, is telephone inquiries are ready reference and copy requests. Detailed or difficult questions are in person.
- Usually only ready reference.
- With respect to the public, we will provide more assistance than if they came in person.
- Phone questions get second priority. We can't/don't read things to people over the phone, but other than that it is about the same. We can't really help them do their research via the phone so it is different by definition.

- Our policy varies with the patron (law student, other student, attorney, or public) rather than medium.
- Only short sections from specific citations will be read over the phone.
- Very specific ready reference.
- Telephone reference is limited to holdings information for non-members.
- Ready reference, checking holdings, explaining policies, ILL, document delivery, short readings, BUT patrons at the library have priority over an extended call. Of course the disabled get extra phone time and service if possible.
- Ready reference only. Can't leave desk.
- Essentially, we provide more than ready reference but will not answer phone questions that demand extensive research.
- We may limit the length of a phone reference response depending upon the presence of other patrons physically standing at the desk. Patrons at the desk have priority. Also, if the information is too complex or lengthy, we will recommend that the phone patron come in and review the materials in person.
- Will read verbatim short city ordinance or state code sections.
- We will answer what our policy calls "simple" questions over the phone for our patron groups: persons currently affiliated with [the university], law school alumni, other members of the bar, students from other ABA-accredited schools, and government documents patrons.
- We do not read statutes, regulations, cases, court rules, or definitions over the phone.
- Telephone reference questions are generally short answer (e.g. Do you own this title), brief factual questions (e.g. what does this abbreviation mean), etc. No in depth research questions are answered via phone (unless it is a faculty member). Nor do we Shepardize cases over the phone.

Electronic Reference Questions

8. Does your library receive reference questions electronically?

Yes.	88.08%	133	Please skip to question 11
No.	11.26%	17	

9. If you do not currently receive reference questions electronically (other than by telephone), do you plan to do so within the next twelve months?

Yes. 15.79% 3

Please estimate time until date of implementation in months:
(4 months and 12 months)

Please skip to question 11.

No. 78.95% 15

10. If you do not currently receive reference questions electronically and do not plan to do so in the near future, please describe the factors that were considered in reaching this decision.

- Never came up. Questions now are usually ready reference. A separate policy isn't needed.
- We are a private law firm.
- We are in the process of building a new law school into which we will move by the end of this year. Therefore, we have tabled this type of decision-making until we occupy the new space and establish what operational changes need to be implemented there.
- Questions almost always need some kind of clarification or mediation which can only be done by phone or in person.
- Most faculty requests are not true reference questions.
 1. We would get many questions from those other than our primary patrons.
 2. The nature of the reference interview is interactive; we would wind up getting someone's research project without an efficient way to help them narrow the question down.
 3. The combination of A. and B. makes openly offering this kind of service unattractive due to being potentially overly burdensome.
 4. The lack of a policy does not prevent one from helping someone whom one can identify as being from one's own institution. Almost all of my faculty questions and requests come via e-mail. I actively encourage my liaison faculty to use e-mail; it helps me keep track of the requests.
- There has been no actual decision. At this time, neither the Library nor the county has a web site and the Library's e-mail address is not widely published. If we happened to get an e-mail question, we'd answer it.

- Our assistance consists of directing individuals to resources to obtain legal information, e-mail requestors want the answer, not directions for finding the answer. Requests are received from all over the count[r]y, we deal with Washington materials and some federal only, requests would exceed our ability to direct elsewhere. People will often take any response as “the” answer and you open yourself up to liability, especially with the reference interview opportunity removed.
- Staffing which already seems inadequate; difficulty in conducting a reference interview.
- Our online systems and personnel are not ready at this time.
 1. Quality reference interview impossible.
 2. Would be flooded because of notoriety of institution.
 3. Would be less appealing to primary patrons than others.
- We have not discussed it.

The following questions assume that you receive electronic reference questions. If your library does not receive electronic reference questions, there is no need to proceed. Thank you for your time. If your library does receive electronic reference questions, please continue.

11. Approximately how many electronic reference questions does your library receive each week?

Law Firm Libraries:

Average 28.43 electronic reference questions per week;
Median 20; Range 148; 67 responses.

Federal, State and County Law Libraries:

Average 8.44 electronic reference questions per week;
Median 5; Range 39; 29 responses.

Academic Law Libraries:

Average 4.45 electronic reference questions per week;
Median 3; Range 17; 22 responses.

12. In what electronic format do you receive reference questions?

E-mail.	88.89%	128
Web page forms.	9.03%	13

Please specify:

- Via web page forms—not yet, but very soon.
- The webmaster's e-mail link on the webpage.
- ILL requests received via electronic forms (created in Outlook).
- Fax.

13. What steps have you taken to publicize your ability and willingness to receive and respond to electronic reference questions?

- None. (16x)
- None. Word of mouth. (2x)
- None. It is common knowledge & expected at our firm. (3x)
- None. It's always been common knowledge as long as I've been in the library (2 years) that this was an appropriate method.
- None. Those who like to use e-mail send questions this way.
- None, though I do tell people, if the request is time sensitive, they should call me or come to the library in person.
- None. Being a law firm, it is automatically assumed that any e-mail request will be handled.
- None, other than putting our e-mail addresses in every directory. Also, some of the questions are forwarded to us from our MIS department.
- None. They come to the webmaster whose e-mail address is at the bottom of every web page.
- None. Natural result of e-mail. (2x)
- None, other than posting e-mail address on court's web site. (2x)
- None. We answer them only if someone stumbles onto one of our e-mail addresses via the web page and happens to contact us.
- None. We have not encouraged development of an e-mail reference service. Reference questions we receive via e-mail come through our webmaster.
- None, but have e-mail address on Arkansas Judiciary Home Page.
- None yet. We aren't ready to solicit questions this way so right now we are only getting questions from those people who locate our e-mail address. Faculty tend to send questions via e-mail.
- E-mail communications from the library.
- E-mail notice to students and faculty.
- E-mail, library newsletter, library survey that is mentioned, e-mailing requests, set up "Library" e-mail group to receive requests.

- E-mail sent out by MIS department. Just set up e-mail box for “Library” last month. Prior to that just relied on use of e-mail.
- E-mail and word-of-mouth, but only to court system personnel.
- E-mail address on all library promo materials, special book mark, on library web page masthead.
- E-mail is a vital part of our firm. There was no need to publicize since it is part of the office culture to ask for service this way, in addition to walk-in visits and the telephone. Occasionally we receive requests via interoffice mail but that takes too long.
- E-mail is an accepted method of communication here and even if we didn’t want to, we would have to respond to e-mail requests. We’ve set up a separate “library” e-mail address for those individuals who choose not to send to a specific librarian.
- E-mail correspondence is a standard practice in our firm. We do encourage everyone doing library orientations to send their e-mail requests to the “Library” mailing list rather than to individuals. Consequently, we receive them both.
- E-mail address mentioned in most library communications; reminder posted in firm newsletter; newsletter announcement when web page form became available.
- E-mail form on web page; e-mail address in brochure.
- E-mail address is posted on web site.
- Web page.
- In a law firm setting, this is very simple. I interact with everyone in the firm in many ways. When we have new secretaries, paralegals, and attorneys, I take a lot of time to talk to them, make them feel welcome and get to know them on a personal basis and I encourage them to e-mail me any questions that they have and ask me for help with anything they need.
- All new employees receive this information during their orientation.
- (1) New attorney orientation sessions; (2) announcement of same in firm daily newsletter.
- Faculty and student newsletters.
- Separate e-mail address (ref@...), listed on all internal promotional materials and telephone directories
- When sending out notices or summaries about something (e.g. Federal Register items or electronic tables of content), we make it clear they can request the full text from us. The obvious way to do that, when receiving an e-mail notice, would be to request a document by replying by e-mail. Otherwise we haven’t made the medium

an issue. Everyone in the firm has e-mail. Its just a normal, other way to communicate.

- Parts of general library marketing and new attorney/staff orientations.
- I've made verbal presentations (sic) and it is published in our library rules and procedures manual.
- (1) By communicating electronically within the firm with lawyers, paralegals and other staff on a regular basis, they get used to the idea of directing questions electronically. (2) We created a distribution list in our e-mail system for the library reference desk. In this way, people can send questions to the library generically and know that we will direct it to the next available or most appropriate person. We publicize the REFDESK distribution list in our brochure for new people and in occasional directed notices. Also, if we receive messages, individually, which would have been more quickly noticed in the distribution lists, we send individual reminders. (3) By returning results electronically to users, they are conditioned to use e-mail for reference.
- Have an internal e-mail address for the reference desk; publish it in firm's weekly newsletter.
- Bookmarks, articles in library, and firm newsletters.
- We publicize the e-mail address right beside the telephone extension of the library in all manuals and internal publications.
- Orientations, presentations, responses by e-mail mention that we take requests by e-mail.
- Part of orientation for new attorneys.
- Nothing formal. We encourage e-mail requests because of convenience.
- We attach a cover sheet to each item sent from the library with the reference desk e-mail address; we publicize it in our newsletter; we tell people to use the e-mail address when they call and ask how to submit questions.
- I just make certain the attorneys and paralegals know that I'll answer their questions in any medium. Every time I send them a notice or flyer I include my telephone extension and also remind them that they can e-mail me. Our firm is small enough, and I've been here long enough, that they all know me and feel comfortable calling me or e-mailing me with questions.
- Internal newsletter.
- Word of mouth, library publications, orientation, tour, etc.
- We have an e-mail address for the library.

- Mentioned during library orientation tours, in library manual, and in quarterly library newsletter.
- Setting up a “library” group on Outlook so the questions go to all library staff and publicizing it; responding to information requests electronically (even though received in another format); having patrons who telephone their requests resubmit them electronically if more information is needed.
- I use the medium myself to disseminate information.
- Through meetings, workshops, organizational publications, newsletters, e-mails, and our statewide conference.
- SDD to attorneys. Keeping in touch with users about my skills and the information available. Basically, keeping in contact with our users.
- Personal preference—some attorneys e-mail, some call, some write memos, some come down in person. We do send many general information messages via e-mail so we are subtly saying e-mail is a good way to communicate. We service 7 offices so, obviously, the people in our other offices never make face-to-face requests.
- Over the Intranet, in orientation, and by word of mouth.
- Presentations at practice group staff meetings; articles in firm newsletter; included as part of library orientation.
- Mentioned at training classes.
- We have personal addresses as well as a general library address.
- Orientation to new attorneys; information in our library services pamphlet.
- We really haven’t publicized it at all. Some of the faculty just prefer to e-mail us.
- We are going slowly and have not put a form on our web page; we accept referrals from other campus ASK A service.
- We do not publicize. (2x)
- The use of e-mail to communicate with the library is so well-established that we do not need to advertise it or otherwise market it. Of course, it is covered in-depth in our orientation sessions for all new lawyers and “articling students” (or “summer associates,” as you call them in the States).
- Mentioned in library tours, presentations by library staff, in library brochure, when taking phone requests.
- Separate e-mail box for “Library” and an accompanying announcement. This has only been set up for approximately 2 months. Have not yet determined how else we will publicize.

- Information about reference librarians and our service is on the law library web page.
- Firm-wide notifications, individual and small group library orientation sessions; one-on-one reminders during ongoing reference/research projects.
- Firm newsletter and Intranet. (2x)
- We promote the Library services to everyone in the firm. We also have the “JUST ASK” policy in the firm. We tell everyone to call and just ask the Librarians if there is something they need to find out.
- Advertised on our web page and in other library promotional materials.
- Announcements in library newsletter and web site.
- Initial orientation, notice on library Intranet page.
- We haven’t advertised this, except to our faculty. (2x)
- Newsletter articles, e-mail notices to members.
- So far the only thing we’ve done is put the reference e-mail address on our web site! The Wisconsin Court system web site also has a feedback e-mail address, to which reference-type questions are often sent. The webmaster of that site now routinely forwards those questions to us. (These are included in the average figure above).
- Links on county web page, brochure, handouts.
- Advertised on web site and in Library Newsletter.
- Although we don’t maintain our own separate web site and do not “advertise” our willingness to respond to questions via the Web, the “Law Library” is one of the prominent features of the Virginia Judiciary web site (the web site for Virginia’s entire judicial branch). In addition, some questions received by other divisions of the court are forwarded to the library for a response.
- Intranet only.
- Memo and personal interviews with faculty.
- Through orientation sessions, in the library newsletter, Intranet, Internet.
- Faculty only: e-mail spam, faculty handbook, mail link on web page.
- State Bar Newsletter and web site.
- Through the web page for the court. (2x)
- Web site; hardcopy publication. (2x)
- Posted address on web site. Article in local bar journal.
- Word of mouth. Also, I tend to send the results of my research via e-mail, which plants the idea of using e-mail in user’s minds.

- There is a link to law e-mail reference on the university's main library e-mail reference web site and on the law library's web site. Also, if the librarians are talking to groups of people, we give out our individual e-mail addresses so persons can contact us.
- Direct newsletters to clients, through pointing this out when inducting new clients.
- Within the law firm—marketing, word of mouth, handouts, orientations.
- Note to faculty and patrons concerning our reference desk address on outgoing correspondence.
- On the law library web page, there is a link to the librarian/webmaster's e-mail address. We do not actively encourage e-mail reference questions, but we do receive several each month. When the librarians talk to groups of people, they give out their individual e-mail addresses so the audience can contact us.
- Currently there is a notice on our homepage "if any questions, e-mail xxxxx." That is all we do right now. We are in the process of developing procedures, a disclaimer, and a web page form for e-mail reference and hope to have it in place within a month or two.
- Service is listed on library's web page. (2x)
- At this time we do not publicize e-mail reference service. However, when we bring up WebPac and implement e-mail service to all patrons, it will be marketed to students via the student newspaper, at orientation, and possibly a special handout or mailing to students in the externship program. Other marketing options may also be used, although we have not addressed marketing issues for this service.

14. What is your best estimate by *percentage* of the mode of reference questions you receive?

- _____ % face-to-face.
 _____ % telephone.
 _____ % e-mail.
 _____ % web page form.
 _____ % other.

Please specify: (Should total 100%)

Responses are broken out by library type in Appendix 1.

15. What *percentage* of staff time is spent answering reference questions received electronically compared to time spent answering questions received face-to-face and by telephone?

_____ % of time answering questions received electronically.
 _____ % of time answering questions received by telephone.
 _____ % of time answering questions received face-to-face.
 _____ % other.

Please specify: (Should total 100%)

Responses are broken out by library type in Appendix 2.

16. Is there a separate policy for handling electronic reference questions or do staff follow the same policy in handling those questions as face-to-face patrons and telephone patrons? Please indicate all that are true.

Same policy for electronic ref questions as for those received face-to-face: 79.47% 120

Separate policy for electronic ref questions as for those received face-to-face: 4.63% 7

Same policy for electronic ref questions as for those received by telephone: 43.04% 65

Separate policy for electronic ref questions as for those received by telephone: 3.31% 5

17. If your library has a separate specific policy concerning electronic reference questions, is that policy more or less restrictive than your policy for face-to-face patrons?

More restrictive. 27.59% 8

Less restrictive. 0.00% 0

The same. 72.41% 21

18. If your library has a separate specific policy concerning electronic reference questions, is that policy more or less restrictive than your policy for telephone patrons?

More restrictive. 11.54% 3

Less restrictive. 0.00% 0

Same. 88.46% 23

19. If your library's policy for electronic reference is more or less restrictive, please briefly explain how it differs from your policy regarding face-to-face and/or telephone patrons:

- As stated earlier, time sensitive requests—which most of our reference requests are—are best related by any method except e-mail since this is not being monitored on a constant basis.
- While there is no formal difference, we do different levels of service depending on the nature of the patron. i.e. law school students and faculty first; others from our college, then townspeople and alums, then the rest of the world. Except of course SEAALL colleagues.
- We will spend a lot more time with face-to-face clients (particularly with our students and faculty).
- It is only restrictive in that we cannot show them the materials or provide the materials electronically on the phone.
- More restrictive: we typically e-mail answers for very straightforward requests only. Because it is sometimes difficult to respond to an e-mail inquiry, usually because of lack of information, sometimes our reply is simply asking the person to call us directly, rather than having a string of 3 or more back-and-forth e-mail messages. And, while we often, but not always, mention in person or on the phone that we are not attorneys and cannot give legal advice, we “always” include a disclaimer on e-mail responses.
- Less restrictive: we give ourselves more time to respond to e-mail inquiries than phone or in-person ones. In-person is self-explanatory; phone is same-day (usually within less than 4 hrs); e-mail is within 1 working day.
- The electronic policy does not allow us to copy the text of specific citations on to the patron. Instead, if possible, we will refer them to a web site or other resource.
- Telephone reference is limited to holdings information for non-members.
- The VA State Law Library reference policy applies to all questions “received” and makes a distinction between the “type” of patron, not the conduit by which the question is submitted. First, our primary patron group (the justices of the Virginia Supreme Court, the judges of the Va. Court of Appeals, and both courts’ staff) receives priority over all other patrons. Second, whether we “like it or not,” as an “arm” of the court, Virginia’s Unauthorized Practice of Law provisions must temper our responses to questions and we answer each question on a case-by-case basis. For example, if we are able to

determine if the individual is a member of the bar, whether they are sending an e-mail, or standing before the reference desk, they receive the same degree of assistance. If we are not able to determine the status/identity of the patron, whether they've called on the phone or sent an e-mail or written a letter, they receive basic legal reference assistance, but not the in-depth assistance we provide members of the two courts, or the bar. Our statistics reveal most of the electronic questions we're receiving from the public are questions asking for URL's of web sites offering access to the Virginia Code and Virginia's appellate court opinions, basic information about Virginia's judiciary (political science-high school paper-type questions), questions for purposes of genealogical research (my great uncle was a judge in Virginia ...), and information about state agencies. Many of the "legal" questions are "answered" with a referral to the FAQs on the opening page of the Virginia Judiciary web site; these FAQs were prepared by the Young Lawyers Division of our state bar and provide basic answers to questions like: What court handles divorces? How does one execute a name change? etc. At this point, almost all written inquiries we now receive were sent by institutional inmates.

- We only receive e-mail questions from faculty.
- We are required to answer e-mail questions from the public by U.S. Mail. There can be a delay caused because initial request may not include their mailing address.
- Only faculty submit reference questions by telephone or e-mail.
- Not different.
- We only answer simple questions, i.e. ready reference, refer them to web sites where they can read an entire code section, etc. Policy is in process of being developed. Telephone and face-to-face offer chance for "reference interview" while e-mail does not. E-mail by its very nature is limiting unless the reference librarian wants to get into a long involved e-mail correspondence with the e-mail patron. It is often very difficult to understand what the e-mail correspondent really wants.
- Same as telephone, ready reference only.
- In face-to-face situations, we can take patrons to the materials and show them how to use them. With e-mail reference we will only suggest resources. In face-to-face questions, we will deal with major research questions/problems. With e-mail, we only answer "short answer" or "ready reference" questions.

20. Who among your staff is responsible for answering these questions?

- | | | |
|--|--------|----|
| Head of Reference Services/Public Services only. | 10.57% | 13 |
| All of the public services librarians. | 57.72% | 71 |
| Other, please specify: | 28.46% | 35 |
- Our library technician handles requests for case reports, as delegated by me, the Law Librarian.
 - I am a solo librarian at present. (9x)
 - Depends on who is scheduled to work that day. If the reference person is busy or if the question arrives when no reference help is scheduled, the default person is the Head of Reference.
 - Librarians & clerical staff (whenever there are questions they can answer).
 - The reference librarian is responsible; she is backed up by the Library Manager and a Branch Librarian, and occasionally by our Senior Library Assistant.
 - Whoever receives the question answers it if they are able, otherwise they refer it to the reference librarian or the head librarian.
 - Director of the Library.
 - Depends on the question. Research Librarian and Director answer research questions, Library Assistant fulfills requests for copies, articles, etc.
 - Library tech answers some basic queries (address look-up, case retrieval by cite).
 - Information Technology/Reference Librarian.
 - We have one professional librarian and one paraprofessional clerk. We both answer reference questions. Obviously more difficult ones are generally answered by the professional librarian.
 - All the reference librarians.
 - All daytime, full-time staff that work the reference desk.
 - All 2 of the librarians.
 - We have 2 Research Librarians who do the bulk of the reference questions. I, as Head Librarian, will be glad to help out, and the two other librarians who are at the circulation desk can answer any questions or refer questions to the research librarians.
 - All staff answer questions as asked in any format.
 - All staff. We are a 1.5 person library.
 - Director.
 - One librarian has chief responsibility for checking the mailbox, but everyone answers the questions.
 - All staff.

- Electronic Services/ Reference Librarian. (4x)
- Sometimes by me; sometimes by my assistant.
- Two of the three librarians responsible for manning the reference desk are responsible for answering electronic reference questions that appear in the library's "Law Library" e-mail box.
- Library technician.
- Whoever gets the mail.
- We have three librarians working in the library. We all answer reference questions.
- Depends on level of expertise required. Can either be assistant law librarian or law librarian. Simple reference done by assistant.
- The librarian is mostly responsible, but if the library assistant can answer the question, she does.
- Generally speaking, faculty and students who submit electronic reference requests usually choose a reference librarian with whom they have a long-standing relationship.
- At this time, all librarians that have faculty as liaison (including technical services staff). When we bring this service up via WebPac—all librarians that work at the reference desk will answer e-mail reference.

21. How are electronic reference questions distributed in your library to those responsible for answering them?

All messages are received directly by staff member responsible for answering them. 34.15% 42

All messages received at central service point e-mail account and distributed to appropriate staff for response. 27.64% 34

Other, please specify: 34.96% 43

- All e-mail comes to the reference desk and whomever is on the desk answers the questions.
- Staff members answer directly or delegate when appropriate.
- I am a solo librarian at present. (2x)
- Whoever receives it either completes the request or distributes to the appropriate person.
- Messages are usually received by the person who should answer them. If not, the questions are forwarded to the right person.
- Those that go to the head librarian are forwarded on to the person best able or available to answer, or the head librarian takes it on if no one is available.

- Reference questions going to an individual librarian are answered by that librarian. Reference questions going to the general e-mail address are handled by the librarian working at the reference desk when the question arrives.
- Some questions are received individually, some are directed to a distribution list. We self-select (according to job assignment, ability and expertise) questions we are going to handle and notify the user and the others on the distribution list. Sometimes we hand-off the questions received individually. The head reference librarian reviews everything and takes on the questions that are particularly odd or which don't fall into an obvious category. Sometimes we discuss the plan of attack for an extensive question and portion out amongst the staff the tasks required. The person who handles the question may communicate with the requester in a reference "interview," deliver the results, and check on the necessity of follow-up.
- Combination of the above.
- The first person to receive the telephone reference questions answers the question unless teamwork is required to get an answer. E-mail reference sent to LA Lib is picked up by the first person available. Often, e-mail is directed to a specific librarian with subject area knowledge.
- We have a "Library" e-mail address which we encourage attorneys to use, but more often they send a request directly to one of us.
- We have a library reference e-mail address ("libref") that goes to all reference staff. One person prints out the request and deposits it into a central "reference box" along with all other requests. The first person who is free goes to the box and takes out anything marked urgent, otherwise they should take the oldest request in the box and work on that.
- Three library staff members receive indiscriminately and handle or forward to another member as needed. Head librarian gets 75% of the questions initially.
- We have a small staff, 2.5 employees. We answer based upon who gets the question or who is most suited to answer the question.
- Split between: direct to librarians and a central point.
- Some are received centrally, person responding responsible for notifying others.
- Received by Librarian and Assistant Librarian and then distributed appropriately.

- Messages received by any staff member are given to Reference Librarian, if she isn't too busy. If she is, or if the staff member so desires, the recipient fills the request, if capable. Otherwise, it waits until the Reference Librarian is available.
- Duties are defined and responsible party responds. Requests that are potentially unclear are discussed and distributed.
- Requesters can choose to send request to central e-mail so that if I am out someone will still read request, or they can send request directly to me or directly to the library assistant.
- We have an e-mail box for reference questions, but it is not highly publicized. Most questions come in to personal librarian e-mail boxes.
- All questions are received by everyone in the "Library Services" e-mail group (a pre-defined group structured in our e-mail system: the address for the group is simply "Library Services"). The most appropriate person will take the question by replying to the requester and also to the group (so that the others know the question is being taken care of). The "front line" for all reference questions is the individual currently at the reference desk: it is anticipated by the others that s/he will take any reference questions that are received during his/her time at the desk. If s/he is unable to do so, s/he will call upon others in the group for assistance. Also, s/he will forward any relevant questions to a group member specialized in answering specific types of questions (e.g., we individually specialize in tax, litigation, corporate, etc., questions)—unless, of course, that group member has already replied that s/he is dealing with the question. We try to reply (at least a basic "I'm taking care of this") to all reference requests within 10 minutes.
- Requests may be received by any staff member, and if it is a reference person, they will handle; others will send to head of reference.
- Generally answered by the person who takes them. Simpler requests—copies, ready reference—are generally handled by the paraprofessional while more difficult ones would be handled by whichever of us receives the request and can answer it.
- Desk workers are responsible for checking for e-mail messages at the start of each shift.
- Messages are received by individual reference librarians as well as at a central reference desk e-mail account. Patrons are encouraged to e-mail requests to the central reference desk to ensure prompt

response to their requests. Requests received at the central desk are handled in so far as possible by the librarian in attendance at the time; extensive projects and time-sensitive ones are distributed to those available to handle them.

- All come to head librarian.
- Some requests received by individual library staff; others sent to “library” mailbox.
- Some go directly to staff member responsible for answering, some go to central e-mail account.
- We have a separate ref e-mail at the reference desk. The librarian on reference is to check the account and answer any questions. If they can’t, they forward the question to someone who can.
- One librarian has chief responsibility for checking the mailbox, but everyone answers the questions.
- Depends on who receives the request and their capabilities. Easy ones are handled by whoever receives request; more difficult are shared or passed along to Librarian.
- Although we have a reference e-mail address, the few questions we receive still come directly to the reference librarian.
- All messages come in to one address, which all the reference staff have access to. Whoever is staffing the reference desk is responsible for monitoring the inbox, and takes whatever question(s) arrive during her/his shift. If in-person and phone traffic are particularly heavy, the e-mail questions are passed on to the next shift.
- If a request sent to my assistant cannot be answered by her, she forwards it to me.
- The questions either come to the library director or the reference librarian. The questions are then forwarded to the correct individual.
- Received at central e-mail address and answered by whoever is at the Information Desk when the request arrives.
- Because we have a small staff, questions are answered by whoever is available; all staff are qualified.
- The questions are distributed by the Public Services Librarian according to factors such as: time available, knowledge of the librarian, degree of difficulty.
- Messages from faculty to their liaisons generally go directly to the librarian’s e-mail. General e-mail reference questions will come to the reference desk, which any librarian working reference will check.

22. If reference statistics are kept, do you treat statistics about reference questions received electronically the same or differently from face-to-face reference questions.

Treat the same.	60.75%	65
Treat differently.	39.25%	42

Please specify:

- Different category.
- Statistics are kept separate and added to the reference statistics.
- Coded differently.
- Records of phone—electronic statistics just starting.
- Counted in separate column on stats sheet.
- Because we just this month (Feb. 2000) started routinely receiving reference-type inquiries from the Court system web site, we anticipated an increase in e-mail reference traffic (which has in fact happened). While we normally collect library-wide statistics one week out of every month, right now we are keeping a daily tally of e-mail reference inquiries received and answered. After 2–3 more months, we will probably make e-mail reference stats part of our one-week-a-month routine.
- Treated as a telephone reference.
- Only from faculty, recorded in faculty requests project log.
- Too busy to accurately track—unless billed to client.
- We track only reference questions asked in person or by phone while stationed at the two reference desks.
- There is a separate column for recording e-mail reference statistics during a reference shift. This is also recorded on the liaison statistic form, although not currently tracked.

23. As an information professional, do you find that electronic reference has increased or decreased your workload?

Increased.	37.50%	48
Decreased.	.78%	1
Workload has remained about the same.	61.72%	79

24. If you perceive a change in your workload which you attribute to electronic reference, upon what do you base your opinion? For example, is it based upon statistics, personal observation or experience, etc.

- Personal observation and experience. (19x)

- Personal experience and statistics. (3x)
- Personal observation and experience—people can forward requests that they chance upon in their Internet searching/surfing; they can attach relevant documentation to a request for more info.; it is more convenient for those who work different hours than the library staff and who need to provide additional details.
- Personal observation, and statistics are going up, but we don't separate the electronic stuff.
- Personal observation/experience and consultation with other reference librarians.
- Personal observation. People on other floors are more likely to e-mail a request rather than to telephone or come into the library.
- Personal observation. E-mail requests by faculty have increased workload by reference department considerably.
- Personal observation that there has been slow but steady increase in electronic questions.
- Personal observation of changes in the number and kinds of questions which have increased since the firm became networked on a LAN and a greater rise with Internet access at all desktops via T-1 line.
- Observation—previously questions would not be received by “non-clients,” now these same clients contact us electronically.
- Based on personal observation and experience. It increases workload to the extent that there are that many more reference questions to answer. Of course, it's possible that these are people who would have appeared in person at the Reference Desk had they not e-mailed their questions. So to that extent, it's the same amount of work. Many times the work done to respond to the questions and the actual writing of the responses are done when we are NOT on reference desk duty, so it is in addition to our regular desk duty. Also, it can take longer to respond by e-mail than to merely orally answer a question because of the extra care that must be taken in expressing the answer. Without the face-to-face or telephonic contact, it's harder to tell whether our response is being interpreted in the manner we intended.
- I don't attribute it to electronic reference questions, but to e-mail generally. Keeping up with it is very time-consuming. There are listservs, personal messages, etc.
- E-mail allows for quicker and easier posting of reference questions with a shorter response time expected.

- My answer is based on personal observation alone. But, I believe that e-mail, for example, has made communication easier, and this has allowed for more reference needs to be expressed and answered.
- In our firm, the lawyers will sometimes pose questions to the other lawyers in a message directed to the attorneys distribution list. I am on that list as well, so I field questions that are not directed to the library and which may or may not have found their way to the library. (Sometimes the other lawyers respond with “Ask the Library.”) This increases by a small degree the number of questions we respond to. The other day one of the lawyers told me he had decided to ask the library all his referral questions before he posted them to the attorneys distribution list.
- Traditional research in the Private Law Library (fact to face) was often to find a case or find a code. Electronic research requests are more frequently about finding in-depth company or industry information. The requester is often out-of-the-office and is requesting information that will be taken into a meeting or negotiation. Electronic research also is about information about individuals. Who are they? What groups/organizations do they belong to? What cases have they worked on? These projects take much more time to complete.
- Gut feeling.
- Based on our efforts that makes our library services, which including reference services, known to all the Legal Services programs in New Jersey.
- It is a lot like voice-mail—there can be several requests stacked up on top of the ones you are already doing with in-person clients (a bit more stress!)
- This opinion is based on both personal observation and on statistics! The number of reference questions we field has increased significantly! Many of them are minor, but there is an obvious information need and e-reference has helped us to address it more completely.
- It is based on experience. I have noticed that we just seem to receive more now with e-mail. We have had e-mail several years and everyone is just comfortable using it and they seem more inclined to ask for help.
- It is more convenient for people to mail their questions than to call, especially if the request contains citations to articles, cases, or statutes.

- My opinion is based on statistics. I also base it on my experience of now having to deal with e-mail questions, on top of phone and in-person inquiries, during my reference desk shifts. (I personally work 3 out of 10 4-hour shifts at the desk each week.)
- The Virginia Judiciary web site debuted in March of 1997. We added this category (electronic reference questions) to the reference statistics we had been keeping. This new “category” soon surpassed some of the other “types” of reference questions we’ve tracked since we started keeping statistics. Every year, the number of questions received electronically increases. In addition to this “new” group of patrons (the majority are from the general public), some of our primary customers (i.e. judges and law clerks who are located in other cities) are sending all their questions to us via e-mail. Before e-mail was possible, they called us on the telephone with their questions, which resulted in a long-distance phone call. Thus, not only is electronic reference efficient, it is more economical for members of our courts.

25. As an information professional, do you find that responding to reference questions received electronically makes your job easier or more difficult than questions from face-to-face patrons?

Easier.	26.77%	34
More difficult.	27.56%	35
About the same.	45.67%	58

26. If easier or more difficult, please explain:

EASIER:

- People have to write their requests down so they take more time and think about what they need. We can respond quickly if we have questions and we can send most of their information requests back to them electronically either via e-mail or attached files, etc. An added bonus is not trying to decipher their handwriting or my own.
- Oftentimes no need for details to give them what they want, i.e. reference interview.
- Not as obtrusive as phone or face-to-face, though that does not affect the speed at which answers are needed. It does help with time management for those reference questions that are not time dependent.

- The use of e-mail has meant that I can communicate easily with attorneys and be assured that my communications will be stored for them. E-mail seems less cumbersome and time consuming than telephonic communication.
- I spend less time responding to electronic reference questions because you don't have to play phone tag and you can respond to most of these at any time of the day or night.
- When the lawyers take the time to compose questions in written form, they usually are more careful to include all the information and to phrase things carefully. It is nice to have that considered, written question (besides my hasty notes), while I am sorting through potentially responsive information (like lists of statistical data). And, formatting the information in an e-mail message or simply attaching a file is often easier than creating a Word document or making photocopies or tediously explaining a collection of statistics to a lawyer who is trying to take notes and assimilate the information at the same time.
- Doesn't interrupt work flow. Requests for further explanation can be easily e-mailed back to patron.
- Attorneys usually give more information in an e-mail request than they do in a face-to-face. It is also easier to do a follow-up reference interview after the initial e-mail and this can be done by face-to-face, e-mail, or telephone.
- Questions are usually better defined and provide a written record.
- The attorney usually writes a clearer, more easily understood request than if given via phone.
- I have more time to respond as compared to telephone or personal requests.
- I can open the requests when I have time, and can reply via e-mail with any requests I have for additional information, but mostly, it forces the patron to be specific about their request so if they claim there was an error, I can give them their message. I can cut and paste some things right into my search (this is particularly useful when I have a long list of patents to order online, and then I don't have to worry about mis-typing any numbers).
- Assistance request can be received at any time, without having to be tied down on the phone, and can be answered at different time intervals, thus allowing us to better maximize our output.
- Where feasible, responses to face-to-face patrons are delivered immediately. E-mail and voice-mail requests are handled when and

as soon as time permits. This time shifting ability certainly reduces the frequency of the stress of feeling as though you have to do two things at once.

- I don't have to have patrons spell words. I find they explain things more clearly in electronic requests. It doesn't interrupt what I am doing when I receive questions electronically. I answer more questions electronically than I receive that way. I can cut and paste from Internet, CD-ROM, Lexis.
- As people have to organize their questions in their e-mails, they are more logical and detailed.
- Document delivery and time management is easier with the information in written format. Responding is much easier. I frequently send documents overseas via e-mail.
- I think having to formalize a request into writing has encouraged people to focus their requests.
- Sometimes easier to upload information for patrons; sometimes they ask better questions in written form.
- Most important, it has made it easier for our clients (lawyers and students) to communicate with us with the assurance—no voice-mail, no waiting at the reference desk. We immediately have a written record of all requests. Of course, we usually have follow-up questions (the "reference interview," if necessary), which are pursued by phone or in person. The results or research conducted can also be transmitted electronically (usually as an attachment in a reply e-mail), so there is no lag-time for getting the results of work to the requester.
- At least for e-mail requests, don't have to scribble fast while someone is talking.
- Easier to think of clarifying "reference interview" questions if patron is not standing over you; you can review written requests carefully.
- E-mailed requests are in writing which makes them more clear. Electronic delivery avoids phone tag and/or inability to contact busy people with hectic schedules
- Because you don't have someone standing at your desk waiting, you can often be more complete in your answer and take more time before responding.
- Non-lawyer employees of the Dept of Water Resources usually want specific items like CA code sections. E-mailing the section or URL is easier and faster than photocopying the page in the book and mailing/faxing it.
- Because research requests are well-organized, clear, and concise.

- You have more time to find the answer, they are not waiting there while you are finding the answer and then you can e-mail them back and the answer is there for them. You spend less time on the phone and calling back and forth.
- Easier overall, because the information is written in their words, and it's available to refer back to during the research. There is a downside though ... I frequently have to follow up with the user to clarify or get additional information. That's what happens when there's no reference interview, but it's no different from when someone leaves me a voice-mail or a hand-written note in my chair.
- Less emotional mode of communication.
- Easier to manage time from e-mail requests. But an increase in questions.

MORE DIFFICULT

- With face-to-face requests, a reference interview can be conducted on the spot.
- No opportunity for reference interview, so if the question is unclear [it] requires some back and forth e-mail messages.
- Frequently we have to call up the person to do a more elaborate reference interview.
- The reference interview is more efficiently done face-to-face or over the phone so immediate feedback and specifics can be better discussed. When people e-mail, often enough I have to call them for clarifications.
- Librarians know the sources within their library, and therefore can often walk right to the correct source and locate the information in the index. Electronic research projects take you into unknown sources. Along with having to review more resources for core information for the project, librarians have to use unfamiliar content and organizational material. Weeding out duplicate information from a number of Internet sites is time consuming.
- I believe it makes my job slightly more difficult because the patron thinks they've given a complete question and when I e-mail back with specific questions (or call) they sometimes are annoyed; like it's my fault and I just didn't understand what they wrote or the message they left on the voice-mail.
- More difficult because conducting a "reference interview is more awkward via e-mail than face-to-face.
- I often end up calling the person anyway to clarify the request.

- Only more difficult in that we might have to call or e-mail for clarification or more detail regarding the request. In person we can ask questions right then.
- Requestors tend to give a bare bones explanation (if any!) of what they want so we often have to follow up with a phone call to conduct a reference interview.
- It is more difficult because you do not have the face-to-face interaction. On the other hand, a patron can ask the question from any place and time and you can respond from any place and time.
- The reference interview is not immediate. If all the parameters are not included in the e-mail, such as time frame, cost, charge #, or there are content questions, we prefer to telephone the requestor and get that information prior to starting the research. In a fast-paced law firm, even a few hours waiting for a return phone call can be crucial.
- Delay in doing the reference interview. Clarifying what they need.
- It is harder to follow up with the patron to get further information or clarify what it is they are requesting.
- More difficult because I am unable to conduct a reference interview to discover what the patron really needs.
- The nature of e-mail often means less than sufficient information is given at the outset; and, it can be inconvenient (to impossible) to execute a satisfactory “reference interview.”
- More difficult without a “reference interview.”
- Not as easy to clarify and explain.
- With face-to-face, the reference interview is quicker, with e-mail, if the message is not clear & requires some answers, there is a prolonged delay.
- It is more difficult because the opportunity for a traditional reference interview is missing. One can still do it, but it would take place over a longer period of time and could require several messages back and forth. We try to avoid this by suggesting the patron call us directly (many do, esp. because we have a toll free number). We keep an e-mail folder of these “pending questions” so that if/when someone does call, we have an idea of what the original question was, and what, if any, sources were suggested in the initial reply.
- Face-to-face interviews often resolve questions more quickly and with more teaching of transferable skills than an electronic request.
- You always have to question an e-mail request to make sure you know exactly what the patron wants.

- Discussion of details & parameters of e-mail requests is more difficult than face-to-face discussion. More opportunities for assumptions.
- Call-backs needed for further negotiation.
- More time consuming to conduct reference interview.
- Different categories of client asking different questions causing the need to be ready to put policies in place for handling non-core questions.
- Electronic reference questions tend to come from the public rather than our usual student and faculty patrons. So, they typically ask for broader more advice-oriented information. This means that we have to respond twice: once to request more information about the specific legal problem and a second time to tell them which resources to use. This second response is slower than a face-to-face with most walk-in patrons because we take the time to describe the tools we recommend.
- Electronic questions are more difficult to answer and I feel my answers are less helpful to the patron because it is difficult to ascertain what the patron really needs. Frequently, patrons ask for one thing but as I talk to them I discover they really should look at something else, either instead of what they asked for or as an addition. The sort of two way communication needed is hampered by e-mail.
- The lack of a reference interview. It is very important to have a complete understanding of what the patron actually wants. Without entering into a lengthy, time consuming correspondence with the sender of the e-mail, it is often impossible to ascertain the real object of their reference question.
- Person is not present to provide additional information or clarification.
- There is no real time interplay between the questioner and the librarian so that the question can be refined or explained further. Response time between questioner and librarian is never as rapid as it is in a face to face encounter.

ABOUT THE SAME

- It's easier to receive information like cites, data, names, as there is less of a chance for mistakes being made while writing the info down. For incomplete questions, it can be a bit cumbersome & time-consuming to wait for answers to one's follow-up questions.

- It's easier to the extent that you can do the footwork and respond "at your leisure." It's also easier when there is not someone standing there waiting for an immediate response. However, it can be more time consuming because of the care that must be taken to lessen the chance of being misinterpreted since we don't have that immediate feedback.

EASIER & MORE DIFFICULT

- Depends upon the request. Easier if the request is specific and accurate because the requestor does not interrupt. If the request is not specific a "reference interview" may be necessary. Attorneys are notorious for asking vague questions. If I have to track him/her down to ask what the **** he she really wants, it is a waste of time. It is also a waste of time to find what is asked for and discover it is not what is needed.
- Sometimes knowing exactly what the person making the request wants is more difficult, but responding is often easier because we have so many electronic resources now.

DEPENDS UPON THE QUESTION

- Again, it depends on the question, not how it was received.

27. To your knowledge, does your library plan to eliminate either face-to-face reference or electronic reference in the near future?

Yes, eliminate face-to-face reference.	1.55%	2
Yes, eliminate electronic reference.	0.00%	0
No. (Please skip to question 29)	98.45%	127

28. If your library does plan such an elimination, please explain why.

- Eliminating by default for some client groups, due to eliminating of some library satellite locations and consolidation of staff at remote locations to much of client base.

29. If you work in an academic law library, does your school have a distance education program?

Yes.	14.81%	4
No.	85.19%	23 Please skip to question 31

30. If the answer to question 29 is yes, assuming students in the program communicate reference questions electronically, how are their reference questions treated?

Same as any other student at our institution.	100%	1
Same as an inquiry from a student at another institution.	0%	0
Same as an inquiry from the general public.	0%	0
Other, please specify:	0%	

31. Is it your judgment that electronic reference has been well received by the patrons you are charged to serve?

Yes.	96.75%	119
No.	3.25%	4

Please explain:

YES

- Makes it much more convenient for the attorneys.
- Gives people ability to communicate with us at any time of day or night & from anywhere with Internet access/e-mail access & it affords them means to give complete detail to request, unlike voice-mail which is more limited—i.e. people feel uncomfortable talking for too long.
- E-mail is just any other way we communicate. It is useful, when getting a detailed research or reference request, to have the requester put something in writing, but it is often followed up with face-to-face clarification of the question.
- Patrons like the fact that they can ask questions whenever they arise and that the answers can often be delivered via e-mail attachments such as links to the web or word documents.
- Extra convenience of providing another point of service or access for library.
- I can tell that its popularity is growing by the sheer number of electronic requests we receive and continue to receive.
- It allows our clients to e-mail us at anytime, while the request for information is fresh in their minds. It also serves as a record.
- For the researcher working at their desk or remotely, the ability to send a quick e-mail to the library requesting help is a big benefit.
- E-mail has become an accepted mode of communication, a fact of life for attorneys, and using it to ask for library assistance is now commonplace.

- It gives both parties a lot more flexibility and it provides the end user with something in writing. I'm often asked to respond via e-mail, even if their message has been left via telephone, because they want it in writing.
- We get more and more each day.
- They love not having to leave their desks. We work on very fast response to e-mail requests so they don't see this as a disadvantage.
- As long as they understand that electronic reference is only all right for non-urgent requests.
- Attorneys are usually very pleased to receive responses and documents in e-mail format.
- For attorneys who visit clients world wide, access to the reference librarian is a phone hook-up away. We can complete the reference project and leave it in their e-mail box. Clipping electronic text, or, appending large documents that explain the subject is a matter of electronic capture and distribution. The "patron" can pick up the reference package at any time, in any time zone.
- It is especially good for serving our branch offices which do not have library staff. And, to cover for each other when someone is away.
- They like that they can send me a question and they go on with their work, knowing that I will either present them with the answer or contact them to discuss the question and their needs.
- Another method of communicating, forwarding questions.
- It is extremely convenient. An attorney can send an e-mail at her convenience. She does not have to be present.
- People can make requests as they think of them, no matter the time of day, and no matter where they are (we have offices around the world). They have a record of the request, and whether it was received. We can respond with materials electronically to all parts of the globe, cutting down on copying and faxing costs. (It is much faster to e-mail a document than to fax or pouch it)
- The convenience of attorneys not having to leave their desk, also the ability to handle requests from offices in other cities in a more efficient and effective manner than previously.
- Particularly patrons who arrive at times that no reference librarian is available. They appreciate the possibility of leaving their question, without having to complete a complicated form, by calling the voice-mail box or e-mailing the question from a public terminal.
- It saves them a trip to the library.
- The ones who use it like the convenience.

- People can forward requests that they chance upon in their Internet searching/surfing; they can attach relevant documentation to a request for more info.; it is more convenient for those who work different hours than the library staff and who need to provide additional details.
- Does not require a trip to the library. Information is in a written format so spelling mistakes are eliminated.
- From the responses after I provided the references.
- Quick and easy to send an e-mail and then you have a print record of what you requested.
- The attorneys at our firm are very comfortable with e-mail so they are happy to have that option to communicate with us. They like being able to send their request to all librarians and know that it will be taken care of by someone.
- They like the idea of being able to ask the questions while they are working on their computers.
- It is quick and easy. They like fact that they can send an e-mail when they are thinking of it, even if no librarian is available. It allows tracking also.
- We haven't done much with it yet. Some of the faculty like the convenience of e-mail.
- They are really happy not to play phone tag.
- We are a large and busy law firm, with busy litigation and corporate practices. The lawyers live on their e-mail, which makes it second nature to them to communicate with us from offsite (from home, from clients' offices, from out-of-town) and after hours with the assurance that we have received their requests. Especially for corporate lawyers (who use the "physical" library much less than litigators do), e-reference has raised the library's profile significantly and made it second-nature for them to send us their questions while they're thinking of them.
- Well received by those using it, although obviously the majority still prefer voice or fact-to-face contact.
- We have staff all over the state, and one central library providing reference service, so e-mail is very convenient for our patrons.
- Most of the electronic users send a thank you after we assist them.
- We have received a growing number of electronic reference questions.
- Rapid responses are enabled by electronic reference; this is a definite plus. The ability to "cut and paste" information or attach documents

or add hyperlinks to electronic resources are all positive additions to the service traditionally supplied. The frustration engendered by electronic “glitches” is proof of the general level of acceptance (or dependance) on electronic reference.

- People prefer to stay at their desks and either pick up the phone or send an e-mail, though sometimes they’re frustrated at not receiving an immediate response.
- No complaints as yet.
- Means that they can send the request when they have it and don’t have to wait to physically find one of us.
- They are grateful to receive the information we can provide. Since most of the questions we receive seem related to Wyoming Statutes, we can direct them to the text they need at a site maintained by the Legislative Service Office and they can get the information they need right at their home computer.
- I’m quite sure that convenience is a major factor-people will contact us electronically who wouldn’t bother to contact us any other way.
- As long as they get the answer when they need/want it they’re happy.
- I will often get a “thank you” e-mail from the patrons I help electronically. Often they are looking for some way to find information online and I save them a lot of time and trouble.
- Although very few make use of it.
- We are charged by statute to serve officers of the court, attorneys, government employees and the general public. The general public is the only category that has really discovered our e-mail reference service so far, probably by chance, since we have not widely publicized the service yet. I’m not sure how much the other groups would use the service; since they are usually in need of very quick response, I would guess they’d be more inclined to call. Judging from the numbers of e-mail requests we get, the fact that the number is increasing, and the occasional “thank you very much” replies we receive, it is well-received by the general public.
- They like e-mail. They are happy not to have to come to the library and use the photocopier.
- Have repeat customers; expressions of thanks
- Our primary patrons groups like the ability to contact us electronically; our answers can be “cut and paste” into their documents. It’s “cheaper” for those we serve who are located in another city, yet our response time is much the same for these primary patrons. While the general public does not have access to our library (physically),

electronic reference does provide an opportunity for us to assist; often the questions are easily answered (a list of the current Va. Justices, the telephone number of a particular court) and we use the opportunity to make appropriate referrals when we can. There is much government and public information on the Internet, which can be overwhelming to the average public person “surfing” on the Internet. The many thank-yous we receive indicate they appreciate our referrals to other web sites or state agencies; even though we’re not providing “the answer” we are connecting them to a valuable source of information that they’ve missed.

- Saves them time and they have a written record of their request.
- The only e-mail patrons are law faculty. They appreciate the opportunity to use one centralized location for requests.
- Agency staff is pleased with the quick response time. Generally, requests from the public have a slower response time because they must be sent U.S. mail, however, they appreciate the efforts.
- It is very convenient and patrons are extremely grateful.
- Just like telephone requests.
- Attorneys use it to request information.
- Using e-mail to send questions to the library was automatic and not promoted by the library.
- Patrons are always very grateful.
- It’s a more convenient way to communicate with each other ... and easier/clearer than the voice-mail/handwritten note approach. I’m also more accessible even when I’m out of the office, because I’ll check e-mail more frequently than I check voice-mail.
- Our main patron base is the law students and law faculty of this school; then come the students and faculty of the university at large. Very seldom do these constituencies avail themselves of the e-mail reference option. Most of our e-mail questions come from individuals somewhere in the state (and occasionally from out of state), and they seem quite pleased with the service and often e-mail back their appreciation.
- Convenience of being able to ask questions from home/office whenever they want, not just when we are open.
- We never offered electronic reference. Patrons assumed that since they can find our e-mail addresses on the web, they can send us questions and expect answers.
- Faster access & transmission of results.

- My attorneys initiated it by adopting e-mail to contact the library in lieu of telephoning.
- Customers seem to enjoy the convenience of asking a question whenever that question occurs to them.
- I believe faculty (who account for 60% of our e-mail questions) are grateful that they can get service in this way, in addition to over the phone or in person.
- We are often thanked for the quick response.
- The few who have discovered it as a method love it, but as stated previously, few know about it or choose to use it yet as an option. We will try to increase its use in the coming year.
- I believe that the faculty like the convenience of not playing phone tag and sending their request from their office or home (especially during times librarians may not be in the office). I also believe that once marketed to our students that e-mail reference will “catch on.”
- I usually get some sort of “thank you” note in return.
- I will often get a “thank you” e-mail from the patrons I help electronically. Often they are looking for some way to find information online and I save them a lot of time and trouble.

NO

- No. The service is not being used as it has not been promoted. Students have to read the library newsletter or go to our web site and read the services page to know about the reference service. Restricted to law faculty and law students only, not open to undergraduates or the general public.
- But it is getting better.
- NO IMPACT. Most questions received via e-mail appear to be from distant, out of area persons. The relatively low number of questions received so far has little, if any, impact on our ability to provide our standard services.
- Not used by primary users, i.e., judges, attorneys

If available, please submit a copy of your institution’s electronic reference policy.

APPENDIX 1

14. What is your best estimate by *percentage* of the mode of reference questions you receive?

- _____ % face-to-face
- _____ % telephone
- _____ % e-mail
- _____ % web page form
- _____ % other

Please specify: (Should total 100%)

Responses are broken out by library type in Appendix 3.

14A. Percentage of reference questions handled face-to-face

Percentage of reference questions handled face-to-face	Total raw numbers	Percentage of total responses	Academic Library responses (in percentages)	Federal/State/County Library responses (in percentages)	Law Firm Library responses (in percentages)
10-19 %	13	8.67%	0.00%	0.00%	14.67%
20-29 %	20	13.33%	0.00%	5.88%	24.00%
30-39 %	15	10.00%	0.00%	8.82%	16.00%
40-49 %	19	12.67%	0.00%	8.82%	21.33%
50-59 %	14	9.33%	0.00%	17.65%	8.00%
60-69 %	8	5.33%	11.76%	2.94%	2.67%
70-79 %	16	10.67%	26.47%	5.88%	6.67%
80-89 %	12	8.00%	14.70%	17.65%	1.33%
90-99 %	15	10.00%	20.59%	17.65%	1.33%
no answer	18	12.00%	26.47%	14.71%	4.00%
Totals	150	100.00%	99.99%	100.00%	100.00%

14B. Percentage of reference questions handled by telephone

Percentages of reference questions handled by telephone	Total raw numbers	Percentage of total responses	Academic Library responses (in percentages)	Federal/State/County Library responses (in percentages)	Law Firm Library responses (in percentages)
0-7 %	9	6.00%	5.88%	11.76%	2.67%
8-15 %	23	15.33%	35.29%	17.65%	5.33%
16-23 %	18	12.00%	14.71%	11.76%	10.67%
24-31 %	31	20.67%	11.76%	11.76%	29.33%
32-39 %	9	6.00%	5.88%	2.94%	8.00%
40-47 %	23	15.33%	0.00%	11.76%	22.67%
48-55 %	12	8.00%	0.00%	11.76%	10.67%
56-63 %	4	2.67%	0.00%	5.88%	2.67%
64-71 %	3	2.00%	0.00%	0.00%	4.00%
No answer	18	12.00%	26.47%	14.71%	4.00%
Totals	150	100.00%	99.99%	99.98%	100.01%

14C. Percentages of reference questions handled by e-mail

Percentages of reference questions handled by e-mail	Total raw numbers	Percentage of total responses	Academic Library responses (in percentages)	Federal/State/County Library responses (in percentages)	Law Firm Library responses (in percentages)
0-8 %	55	36.67%	70.59%	64.71%	8.00%
9-17 %	16	10.67%	2.94%	5.88%	17.33%
18-26 %	18	12.00%	0.00%	5.88%	21.33%
27-35 %	20	13.33%	0.00%	5.88%	22.67%
36-44 %	12	8.00%	0.00%	2.94%	14.67%
45-53 %	7	4.67%	0.00%	0.00%	6.67%
54-62 %	0	0.00%	0.00%	0.00%	0.00%

Percentages of reference questions handled by e-mail	Total raw numbers	Percentage of total responses	Academic Library responses (in percentages)	Federal/State/County Library responses (in percentages)	Law Firm Library responses (in percentages)
63-71 %	2	1.33%	0.00%	0.00%	2.67%
72-80 %	2	1.33%	0.00%	0.00%	2.67%
No answer	18	12.00%	26.47%	14.71%	4.00%
Totals	150	100.00%	100.00%	100.00%	100.01%

14D. Percentages of reference questions handled by Web page form

Percentages of reference questions handled by Web page form	Total raw numbers	Percentage of total responses	Academic Library responses (in percentages)	Federal/State/County Library responses (in percentages)	Law Firm Library responses (in percentages)
0-1 %	55	36.67%	64.71%	82.35%	1.33%
2-3 %	16	10.67%	0.00%	0.00%	20.00%
4-5 %	18	12.00%	2.94%	2.94%	21.33%
6-7 %	20	13.33%	0.00%	0.00%	26.67%
8-9 %	12	8.00%	0.00%	0.00%	16.00%
10-11 %	7	4.67%	5.88%	0.00%	6.67%
12-13 %	0	0.00%	0.00%	0.00%	0.00%
14-15 %	2	1.33%	0.00%	0.00%	1.33%
16-17 %	2	1.33%	0.00%	0.00%	2.67%
No answer	18	12.00%	26.47%	14.71%	4.00%
Totals	150	100.00%	100.00%	100.00%	100.00%

14E. Percentage of reference questions handled—“other”

Percentage of reference questions handled—“other”	Total raw numbers	Percentage of total responses	Academic Library responses (in percentages)	Federal/State/County Library responses (in percentages)	Law Firm Library responses (in percentages)
0–3 %	123	82.00%	73.53%	82.35%	85.33%
4–7 %	2	1.33%	0.00%	2.94%	1.33%
8–11 %	4	2.67%	0.00%	0.00%	5.33%
12–15 %	0	0.00%	0.00%	0.00%	0.00%
16–19 %	0	0.00%	0.00%	0.00%	0.00%
20–23 %	2	1.33%	0.00%	0.00%	2.67%
24–27 %	0	0.00%	0.00%	0.00%	0.00%
28–32 %	1	.67%	0.00%	0.00%	1.33%
33–35 %	0	0.00%	0.00%	0.00%	0.00%
No answer	18	12.00%	26.47%	14.71%	4.00%
Totals	150	100.00%	100.00%	100.00%	99.99%

APPENDIX 2

15. What *percentage* of staff time is spent answering reference questions received electronically compared to time spent answering questions received face-to-face and by telephone?

- _____ % of time answering questions received electronically
- _____ % of time answering questions received by telephone
- _____ % of time answering questions received face-to-face
- _____ % other

Please specify:

15A. Percentage of staff time spent answering questions received electronically

Percentage of staff time spent answering questions received electronically	Total raw numbers	Percentage of total responses	Academic Library responses (in percentages)	Federal/State/County Library responses (in percentages)	Law Firm Library responses (in percentages)
0-9 %	60	40.00%	50.00%	52.94%	28.00%
10-19 %	18	12.00%	8.82%	8.82%	16.00%
20-29 %	17	11.33%	8.82%	17.65%	10.67%
30-39 %	14	9.33%	2.94%	2.94%	16.00%
40-49 %	11	7.33%	0.00%	2.94%	12.00%
50-59 %	4	2.67%	0.00%	0.00%	5.33%
60-69 %	4	2.67%	0.00%	0.00%	4.00%
70-79 %	1	.67%	0.00%	0.00%	1.33%
80-89 %	3	2.00%	2.94%	0.00%	2.67%
No answer	18	12.00%	26.47%	14.71%	4.00%
Totals	150	100.00%	99.99%	100.00%	100.00%

15B. Percentage of staff time spent answering questions received by telephone

Percentage of staff time spent answering questions received by telephone	Total raw numbers	Percentage of total responses	Academic Library responses (in percentages)	Federal/State/County Library responses (in percentages)	Law Firm Library responses (in percentages)
0-8 %	36	24.00%	26.47%	23.53%	24.00%
9-17 %	26	17.33%	35.29%	14.71%	12.00%
18-26 %	15	10.00%	0.00%	11.76%	12.00%
27-35 %	28	18.67%	5.88%	11.76%	26.67%
36-44 %	11	7.33%	2.94%	8.82%	10.67%
45-53 %	7	4.67%	0.00%	11.76%	2.67%
54-62 %	4	2.67%	0.00%	0.00%	4.00%
63-71 %	3	2.00%	0.00%	2.94%	2.67%
72-80 %	2	1.33%	2.94%	0.00%	1.33%
No answer	18	12.00%	26.47%	14.71%	4.00%
Totals	150	100.00%	99.99%	99.99%	100.01%

15C. Percentage of staff time spent answering reference questions received face-to-face

Percentage of staff time spent answering reference questions received face-to-face	Total raw numbers	Percentage of total responses	Academic Library responses (in percentages)	Federal/State/County Library responses (in percentages)	Law Firm Library responses (in percentages)
0-10 %	29	19.46%	5.88%	9.09%	28.00%
11-21%	9	6.04%	2.94%	0.00%	10.67%
22-32 %	20	13.42%	0.00%	6.06%	24.00%

Percentage of staff time spent answering reference questions received face-to-face	Total raw numbers	Percentage of total responses	Academic Library responses (in percentages)	Federal/State/County Library responses (in percentages)	Law Firm Library responses (in percentages)
33-43 %	22	14.77%	0.00%	18.18%	20.00%
44-54 %	9	6.04%	0.00%	15.15%	4.00%
55-65 %	9	6.04%	11.76%	3.03%	4.00%
66-76 %	6	4.03%	8.82%	0.00%	4.00%
77-87 %	11	7.38%	20.59%	12.12%	0.00%
88-98 %	16	10.74%	23.53%	21.21%	1.33%
No answer	18	12.08%	26.47%	15.15%	4.00%
Totals	149	100.00%	99.99%	99.99%	100.00%

15D. Percentage of staff time spent answering reference questions by other means

Percentage of staff time spent answering reference questions by other means	Total raw numbers	Percentage of total responses	Academic Library responses (in percentages)	Federal/State/County Library responses (in percentages)	Law Firm Library responses (in percentages)
0-11 %	124	84.35%	73.53%	84.38%	89.33%
12-23 %	3	2.04%	0.00%	0.00%	4.00%
24-35 %	1	.68%	0.00%	0.00%	1.33%
36-47 %	0	0.00%	0.00%	0.00%	0.00%
48-59 %	0	0.00%	0.00%	0.00%	0.00%
60-71 %	0	0.00%	0.00%	0.00%	0.00%
72-83 %	0	0.00%	0.00%	0.00%	0.00%
84-95 %	0	0.00%	0.00%	0.00%	0.00%

Percentage of staff time spent answering reference questions by other means	Total raw numbers	Percentage of total responses	Academic Library responses (in percentages)	Federal/State/County Library responses (in percentages)	Law Firm Library responses (in percentages)
96-107 %	1	.68%	0.00%	0.00%	1.33%
No answer	18	12.24%	26.47%	15.63%	4.00%
Totals	147	99.99%	100.00%	100.01%	99.99%

APPENDIX 3 SAMPLE POLICIES

Education & Reference Policy of Reading Text to Users over the Phone Boston College Law Library Adopted April 9, 1996

The E & R staff will not read the text of any of the following materials over the telephone:

- statutes
- cases
- administrative agency regulations or decisions
- court rules

The E & R staff will not Shepardize, Auto-cite, or Insta-Cite a case, statute or any other primary or secondary source over the phone.

E & R staff will read biographical information about lawyers and judges over the telephone, from sources including Martindale Hubbell, the various Who's Who volumes, the American Bench, the Almanac of the Federal Judiciary and the Massachusetts Lawyer's Diary. If a user asks for evaluative information from Martindale Hubbell, the E & R staff member will read the abbreviation listed and also will read the explanation of the abbreviation.

**Legal Reference Service Policy
University of San Francisco Law Library
March 19, 1999**

4. Service Limitations

4.3 Telephone Reference

The Law Library reference staff may answer simple reference questions over the phone for Law Library patrons eligible to receive reference service under this policy. Reference requests made in person will receive priority.

The Law Library reference staff will not read cases, statutes, regulations, court rules or definitions over the phone.

4.4 E-mail Reference

The Law Library reference staff may answer simple reference questions received via e-mail for persons currently affiliated with the University of San Francisco—with members of the University of San Francisco law community having priority.

The Law Library reference staff may answer simple e-mail questions relating to the California and Federal depository government documents holdings of the University of San Francisco Law Library.

In all instances, reference requests made in person will receive priority.

Policy for Reference E-mail Account

LSU Law Center Library

Louisiana State University

August 13, 1999

1. The e-mail account for the Reference Desk is a LotusNotes account and eventually will be accessible from any staff member's desktop. The account has its own password which is shared among the reference staff. The Reference E-mail account will be accessed primarily from the Reference Desk but also from LotusNotes in each Reference staff member's office or potentially any other computer that links into the LSU LotusNotes system. In the near future, the account will be accessible via the web through PAWS. If staff members answer Reference e-mail away from the Ref. Desk, it is important to respond from the Reference Desk Account instead of the Reference staff member's personal account.
2. Each Reference staff member should be responsible for the incoming e-mail during her shift. The mail should be checked at least once during a shift, preferably at the beginning and the end. This includes weekend shifts. The person working the first shift of each day is also responsible for any e-mail received since the end of the previous shift. Anyone finding e-mail which arrived during someone else's shift should forward that e-mail to that staff member. If a staff member is too busy during their shift to check the e-mail account, they will still be responsible for responding appropriately to any e-mail inquiries received during their shift.
3. Once a staff member opens an e-mail message, she is responsible for responding appropriately to that message. It will be assumed that an opened e-mail message is being dealt with. Staff members should include the initial inquiry along with their response when sending their reply. This will archive both the initial inquiry and our response in the "sent" folder. Once a staff member responds to an e-mail message, the original inquiry should be deleted.
4. Substantively, e-mail inquiries will be dealt with like telephone inquiries. When responding to inquiries from the general public, staff will not provide any additional assistance to e-mail patrons that would not be provided to telephone patrons. Form responses, applicable or adaptable in common situations, have been drafted and are available to staff. Often, when an e-mail patron seeks the answer to a legal question, they should

be directed to seek the advice of a private attorney (generally through a lawyer referral service, not specifically to a private attorney) and alternatively referred to another public law library when the e-mail patron is remote. Local e-mail patrons should be invited to visit our library in person for research assistance. It is important NOT to become too engaged in responding to e-mail reference questions for inquiries that are not from our primary patrons (law faculty, students and staff) or that are beyond our resources (which may include staff time). Again, standard is the same as for treatment of telephone inquiries. The staff will not give legal advice or actually research the law for an e-mail patron who is not one of our primary patrons, but will provide only ready reference responses or referrals. For law faculty, staff and students, however, the e-mail account gives them yet another way to communicate with the law library and their inquiries should be dealt with completely and thoroughly.

5. E-mail responses to general public e-mail patrons will be signed "LSU Law Center Library." Additionally, each of those e-mail responses should also include an identifying mark unique to the staff member responding to the e-mail. For that purpose, each staff member will be assigned a number and the assignment will be confidential within the library and managed by the Head of Reference. The use of that number on the e-mail response should facilitate the identification of the responding staff member should there be any follow-up required (additional questions, etc.).
6. Staff will not accept requests for Photocopy Service via the Reference e-mail account. Plans for a possible form for that purpose will be developed in the future. The form might link from our law library web page. Any requests that are received should be responded to with the appropriate telephone number for the Photocopy Service, (XXX) XXX-XXXX.
7. Any "prisoner letter" requests received via the Reference e-mail account will be referred to the staff member currently responsible for replying to such written inquiries. Any substantial increase in the volume of "prisoner letters" via e-mail will necessitate a review of this policy.

Electronic (E-Mail) Reference Policy and Procedures
The Thomas M. Cooley Law Library
Approved 3/2/00

I. Purpose

- A. To provide limited electronic reference service to all patrons of the Thomas M. Cooley Law School Library in accordance with the mission of the Educational Services Department.

II. Electronic Reference Service is Limited to the Following Types of Questions.

- A. "Short Answer Questions," for example,
1. Does the library own a particular title
 2. Questions requiring brief facts, statistics, addresses, etc.
 3. Parallel citations
 4. This excludes "Shepardizing" a case or checking its authoritative status.
- B. Advice on research tools to consult for a project or paper.
- C. Forms
1. We will not recommend or give advice about forms. See the Reference Service Policy for the Cooley Law Library
 2. We will provide the location of web sites that contain legal forms.
- D. Research Project Requests
1. Requests by Full-time Faculty Members will be monitored under Section IV below and if appropriate will be sent to their library liaison.
 2. Any other research requests are not within the scope of our e-mail reference service policy. See the Reference Service Policy for the Cooley Law Library

III. Providing Legal Advice

- A. Per the Reference Service Policy for the Cooley Law School Library, the reference staff is precluded from providing legal advice or interpreting sources of legal authority on law-related inquiries.

IV. Monitoring the Ask a Reference Librarian Mail Box

- A. All e-mail reference questions are sent to a "RefDesk" Mailbox
B. All reference librarians will have access to this mailbox.

- C. During a reference shift,
 - 1. The mail box is checked once every hour (generally on the hour), or as near to it as time permits.
 - 2. The librarian will answer the question, as quickly as time permits. “In person” patrons take preference over e-mail reference questions.

- V. Timeliness of Response to E-mail Reference Question
 - A. The GroupWise automatic reply function will be set to acknowledge receipt of incoming messages.
 - B. If a Librarian is unable to answer a question during their assigned reference shift (“In person” patrons take precedence to e-mail reference questions).
 - 1. They will notify the patron of the delay, and
 - 2. Answer the question as time permits, or Ask another librarian for assistance if necessary.

- VI. Standard Responses
 - A. The following standard responses are to be used if applicable
 - 1. We are unable to respond to your inquiry, because you are requesting legal advice or an interpretation of legal material.
 - 2. We are unable to respond to your inquiry, because _____ . The librarian should supply an appropriate answer, for example, “our library does not own that title,” “our holdings only go back to 19XX.”

APPENDIX 4

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