Reference Report

Reference statistics are reviewed annually to examine details of interactions between Library reference staff and Library patrons. The resulting information may be used to modify reference response procedures, desk staffing schedules, and other elements of the Library's reference assistance provision.

The Reference Report examines only direct interactions between reference staff and patrons, meaning instances when a patron contacts the Library with a question related to legal information, resources, or research ("information interaction"). The Report does not touch upon other avenues of patron-library contact, such as website or database use, or educational programs offered by the Library. It does not include information about Library visitors who do not interact with staff. Information on overall Library activity during the fiscal year is available in the Library's Annual Highlights.

Services

The Library provides reference and research assistance to Maryland Judiciary judges and staff, attorneys, librarians, government agencies, students, and members of the general public, including self-represented litigants (SRLs), correctional facility residents, and others in search of legal information for many purposes. Patrons are mainly either Maryland residents or have a question about Maryland law.

Reference staff communicate with patrons through in-person visits, telephone, email, regular mail, and chat follow-up as a partner in the Maryland AskUsNow! 24/7 chat reference cooperative.

Interactions with patrons range from brief directional questions to lengthy research queries. Staff assist through provision of informational materials, instructional assistance, and evaluation of resources. Reference staff adhere to Library guidelines for reference provision, including the *Guidelines for Legal Information Service to the Public,* www.lawlib.state.md.us/services/guidelines-public.html , and the *Guidelines for E-Mail Reference Service,* www.lawlib.state.md.us/aboutus/policies/EmailReferenceGuidelinesMSLL.pdf.

Statistical Summary

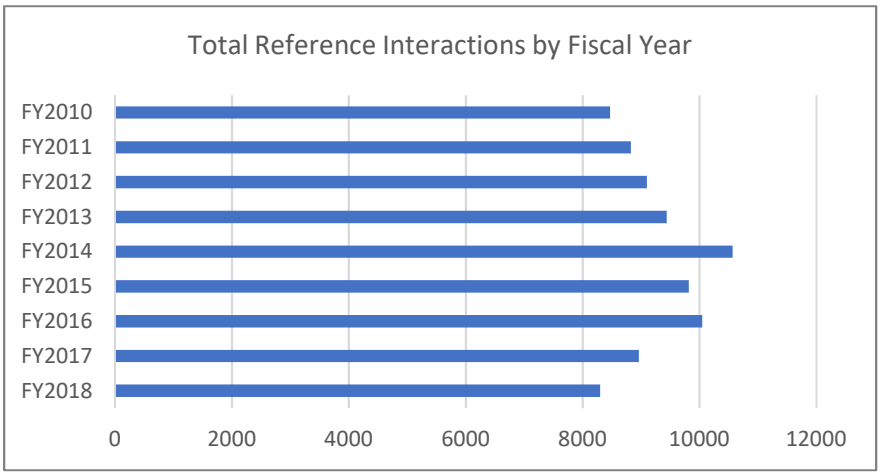
Patron usage statistics are tracked using a combination of tools. Tracking categories are based on those recommended by the Conference of Maryland Court Law Library Directors (CMCLLD). The manner in which the patron contacts the Library dictates the statistical gathering method used and the details recorded about that interaction.

- In-person, telephone, and letter inquiries are recorded on the Gimlet system (gimlet.com). Staff record the format, location, patron category, question type, and duration of each interaction. Pre-set tags are used to record additional details of interest, such as referrals to the Maryland Courts Self-Help Center or usage by pro bono service providers.
- Email inquiries are recorded through a count of outgoing email responses. For emails, only the monthly total is recorded.
- Chat follow-up interactions are tracked through QuestionPoint, the system used by Maryland AskUsNow! Only the monthly totals are recorded.

Direct interactions between reference staff and library users are not the sole measure of the assistance that library staff provide to legal information researchers. Researchers may access library resources through a number of gateways. Interacting with staff is only one legal research path.

Reference staff handled a total of 8,300 reference interactions during FY2018, a decrease of 7.4% from FY2017.

Fiscal Year	% Change from Prior Year
FY2018	-7%
FY2017	-11%
FY2016	2%
FY2015	-9%
FY2014	12%
FY2013	4%
FY2012	3%
FY2011	4%
FY2010	---



There is no clear indication of why the straight number of reference interactions is lower. The decrease may be due to an increase in assistance services available with no direct library contact. Such services include legal clinics like Lawyer in the Library programs, online information from sources similar to the Maryland People's Law Library, and the Maryland Courts Self-Help Centers (SHC), particularly the telephone and chat SHC, whose numbers continue to rise significantly (see the Maryland Access to Justice Department's report, *Resources for Self-Represented Litigants in Maryland Courts,* https://www.courts.state.md.us/accesstojustice/publications). The State Law Library partners with many of these initiatives. Thus the Library, while not a direct contact measured in the statistics viewed in this Report, is an integral part of growing services to the public and the self-represented.

Patron Characteristics

The Library's patrons include the Maryland Judiciary (judges, law clerks, staff), the Bar (private and pro bono attorneys, law firm staff and paralegals), and the public (self-represented litigants, students, historians, genealogists and general legal researchers, and staff from public libraries). Patron type information is gathered for in-person, telephone, and letter inquiries using Gimlet. Email and chat sessions are recorded through separate processes (see Statistical Summary, above). Those processes do not include the collection of patron detail. Gimlet-recorded interactions constitute 49%, essentially half of all library reference interactions, and are used to estimate a picture of the whole. It is worth noting here that while specifics of email transactions, most notably patron category and duration of transaction, are not collected at this time, the Library is implementing new collection procedures for FY2019, to include such detail.

While the absolute number of reference interactions has declined, the proportion of reference interactions with the public, compared to the whole, has grown steadily, rising since FY2013 more than 15% to 66% of the total in FY2018. From a service perspective, this is notable because Library staff often need to take additional effort and time to explain concepts and processes to patrons with no legal

background. The higher the proportion of "public" patrons, the more time and effort is required of staff while at the reference desk.

Patron Categories Fiscal Year Comparison

Patron Category	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
Public	51%	58%	61%	61%	63%	66%
Judiciary	19%	15%	15%	14%	13%	12%
Bar	19%	17%	14%	13%	13%	13%
Student	9%	6%	5%	6%	5%	3%
Library	2%	3%	2%	3%	3%	3%
Government	n/a	2%	2%	3%	3%	3%

Any patron not recognizable as Judiciary, Bar, Student, Library, or Government is classed as "Public."

Reference and Research Questions

Questions received by the Library run from quick inquiries to requests for lengthy research assistance, and cover every topic imaginable. Some samples of questions received in FY2018 include:

- How do I open a tattoo parlor?
- What are my rights as a mobile park resident?
- How do I transfer my arrearage order to the Social Security Administration's Court Order Garnishment System?
- What requirements does my condominium association have to follow related to smoke alarms and carbon monoxide detectors?
- What is the difference between "per capita" and "per stirpes" designations in a will? How do those differences apply?
- Are garnishments halted when there is an automatic stay in effect after filing for Chapter 7 bankruptcy relief?
- What are my rights for ongoing medical treatment as part of my worker's compensation benefits?
- Can I have someone removed as executor of my stepfather's estate?
- What is the legal standard for regaining custody of children after their guardian has been removed due to neglect?
- Can you help me find civil cases against organizations that have allowed violence to occur?
- How do I remove someone's personal belongings from a house after foreclosure?
- What is the statutory history of first degree murder?
- Can an email create a legally binding contract?
- Are there housing restrictions for registrants on the Sex Offender Registry?
- Can you help me find information on mitigation of damages in a tort action related to an existing defect in Maryland?
- Can you send me forms for due process hearings for a special education dispute?
- How can I force my neighbor to help pay for the removal of a tree that is on both of our properties?
- How do I register an out-of-state guardianship order in Maryland?
- How can I force a witness to come to court and testify in a hearing?
- Is an adult child responsible for the cost of caring for a disabled parent?
- What is a "common law" offence?

- How do I research questions about restrictive covenants?

A look at certain facets of questions received and managed by the Library provides insight into the patron population. Statistics help identify staff time and volume needed to handle inquiries, as well as the type of assistance needed from Library staff in addressing the inquiries.

Question Duration

The Library has categorized the duration of questions (length of time required to complete) since FY2014. Over the five years of measurement, interactions categorized as "brief", taking only a few minutes to complete, have dropped by almost 10%. In contrast, interactions ranging just above (6-15 minutes), and interactions in the moderately lengthy category (31-60 minute) have both grown. Over the same time span, the percentage of total work volume with the public grew. As suggested above, in Patron Characteristics, there may be a correlation between the two. Non-legal-trained patrons often require additional time to explain concepts and procedures. Thus, the higher the percentage of public patrons, the higher the percentage in the longer duration categories.

Duration of Questions Recorded on Gimlet

Minutes	FY2014	FY2015	FY2016	FY2017	FY2018
0 – 5	62%	60%	54%	49%	53%
6 to 15	26%	27%	30%	35%	32%
16 – 30	9%	9%	10%	11%	9%
31 – 60	2%	3%	4%	4%	4%
60+	1%	1%	2%	1%	2%

As noted above (in Patron Characteristics), the specifics of email transactions, including duration, have not been collected. Because the composition of a written response, as compared to a spoken one, takes more time (see below, Services to Correctional Facility Residents), the calculation of duration percentages without email responses likely reflects an inaccurate picture of the time required for completing reference requests. The Library is implementing new statistical collection procedures for FY2019 to attempt to collect this data.

Spotlight: Legislative History Research

The Library assists patrons researching legislative history, mainly Maryland state or county histories. Legislative history research requires considerable time and is most often requested by patrons from the Judiciary or government entities. In FY2018, only 1% of requests marked Public related to legislative history, compared to 9% of requests marked Judiciary and 10% of requests marked Government. Beginning in FY2019, the Library will add regulatory and rules history research requests to this reference subcategory, to monitor the segment of staff time devoted to this area of research.

Spotlight: Services to Correctional Facility Residents

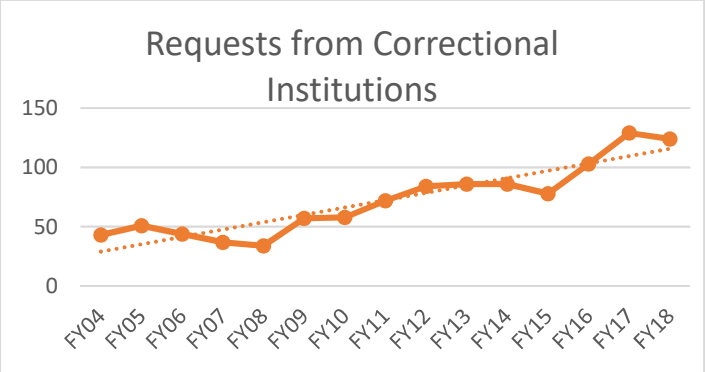
The Library serves residents of correctional facilities by providing resources to help explain general legal topics and procedures, and by providing specific legal materials in response to direct citation requests. Requests from facilities constitute the entirety of reference requests received in letter format.

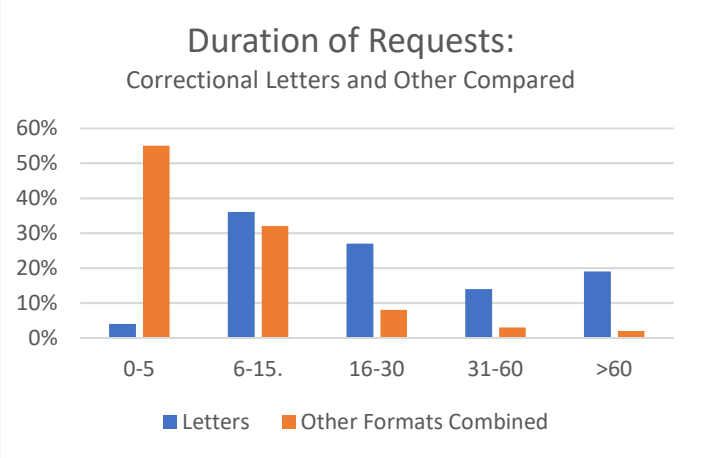
The Library categorizes correctional residents as part of the public population, and as such, charges document delivery fees in keeping with standard policies. Currently, the Library charges $.50 per page,

prepaid, with waivers available for up to five pages of a first request. Additional waivers may be applied at staff discretion. Upon receipt of a request, library staff review for specific citations, provide a page count cost, and upon receipt of payment, mail out the material. Where and when available, staff provide information on locating the requested information for free, with the suggestion that the requester speak with their institution's librarian, family member or friend to access the information at no cost.

Statistics specific to correctional requests have been kept since FY2004. The number of requests received from correctional residents has grown in that time from 43 (FY2004) to 124 (FY2018).

The growth in number of requests from correctional facility residents is significant. Letters provide no real ability to conduct a substantive reference interview. Reference staff must carefully craft responses pointing patrons to information without the benefit of such an interchange. Often, the manner in which questions are written make it clear the patron has limited understanding of the law and legal system. Responses are written to educate and inform; drafting such responses is time-consuming. This is reflected in the length of time a response in this category takes, compared to a combination of other categories. The bulk of responses to non-correctional requests falls in the 0-15 minute range, while the bulk of responses to correctional requests falls in the 6-30 minute range; and 19% of correctional requests take more than one hour to complete, compared with 2% in all other categories combined.



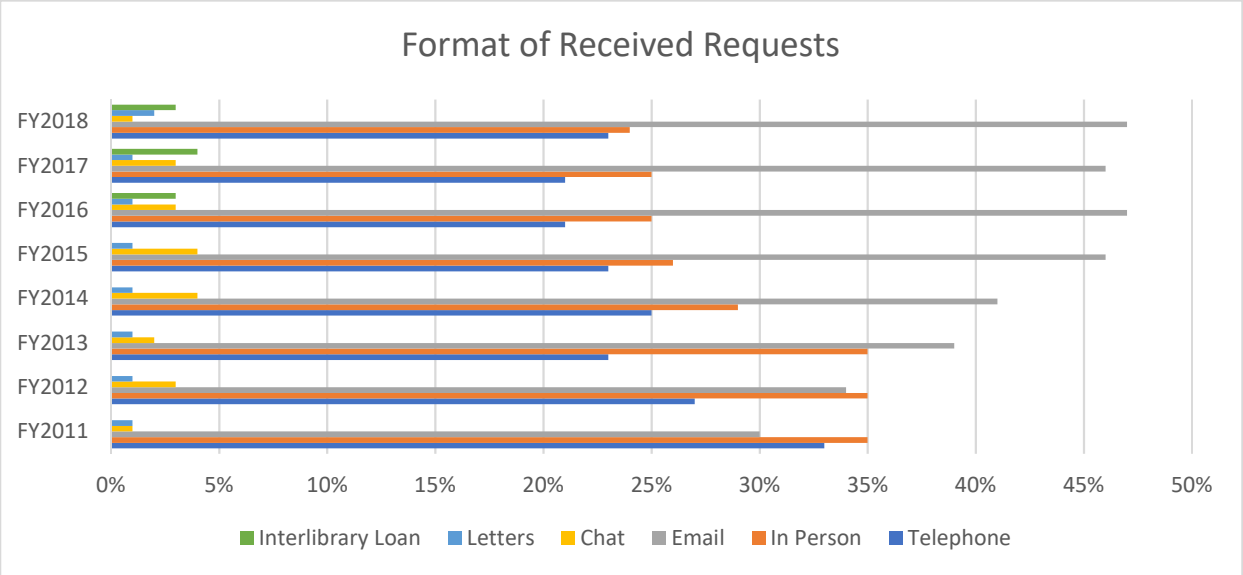


Patron Communication

The Library makes its reference services available through multiple communication methods. Important details include:

- Both traditional in-person visits and telephone requests have declined.
- Letters, while doubling in percentage of requests from FY2011, still comprise less than 2% of total reference requests.
- Chat numbers peaked from FY2014-FY2016. Mid-way through FY2017, the Library discontinued live chat participation, and returned to responding via email follow-up only, so chat no longer plays a large role in reference numbers.
- Email has increased in the proportion of reference interactions, from 30% in FY2011 to over 47% in FY2018.

Question Format	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
Telephone	33%	27%	23%	25%	23%	21%	21%	23%
In Person	35%	35%	35%	29%	26%	25%	25%	24%
Email	30%	34%	39%	41%	46%	47%	46%	47%
Chat	1%	3%	2%	4%	4%	3%	3%	1%
Letters	1%	1%	1%	1%	1%	1%	1%	2%
Interlibrary Loan	n/a	n/a	n/a	n/a	n/a	3%	4%	3%



Conclusion

The Library continues to see growth in the percentage of workload dedicated to requests from the public. The investment of effort in addressing questions from a segment of the population largely uninformed about legal concepts and processes contributes significantly to staff workload, and may be the main factor in the increase in duration of request completion. A second factor contributing to increased duration may be, simply, the wide availability of free information, particularly in the form of websites like the Maryland People's Law Library, and legal assistance clinics, like the Lawyer in the Library program initiated by Maryland Legal Aid. People are able to find basic information for themselves, and turn to the library when they have more complicated questions, resulting in lengthier reference interactions.

In summary, Fiscal Year 2018 saw the following notable activity:

- The percentage of public requests rose, from 51% (FY2013) to 66% (FY2018);
- The duration of requests increased, reflected mainly in the decreased percentage of brief (0-5 minute) interactions, from 62% (FY2014) to 53% (FY2018);
- The percentage of requests received by email rose, from 30% (FY2011) to 47% (FY2018).