APPENDIX 5.3: INFOSPEND – INSTRUCTIONS

INFORMATION-SPEND SURVEY

Introduction

Participation in this survey requires that you submit a brief monthly return, preferably by e-mail. This return comprises values that represent the total amount spent in each of six clearly identified categories adjusted to reflect the average spend per practitioner on that product or service for that month. Details are given below.

The results from each participating organisation will be collated and subjected to statistical analysis. The outcome will be submitted to De Rebus for publication towards the end of 2001, at which stage each participating organisation may elect to announce its participation or to remain anonymous. At no stage will the specific results from participating organisations be made public.

Instructions

1. Save the attached Analysis form to assist in your preparation of each monthly return. Print or save electronically for each of 12 months and retain for the duration of the survey in the event of a query or a quality check.

2. Scrutinise the list of 14 information products or services that appear below. If your organisation does not subscribe to any of the products or services you will submit a nil return for that item.

3. Capture the expenditure ex VAT on all information products or services when payment is made. Some suggestions are given below for data capture, and you may request more detailed assistance at any time. It is possible to capture data and calculate expenditure manually but this is considerably more work than by computer.

4. Calculate the total amount spent on the six items for each month, and enter details on the Analysis form for that month. Salary details for all information professionals in your organisation must include the basic (gross) salary and any cash benefits. Record the amounts that the organisation pays in subscriptions to professional bodies like OSALL or LIASA, training costs, conference fees or any other professional support charges.

5. Divide the total amount spent on each item by the number of legal practitioners in the organisation for that month. This figure includes all directors, professional assistants, candidate attorneys and associates for whom the services are provided.

6. Record these values on the Analysis form and submit them to the researcher. A prompt will be sent to you in the first week of each new month.

Information products and services

BOOKS, JOURNALS, LOOSELEAF SUBSCRIPTIONS, MISCELLANEOUS DOCUMENTS
- Books
- Journals (including annual subscriptions)
- Looseleaf subscriptions (both the binder and the loose pages)
- Miscellaneous items like single copies of Government Gazettes

ELECTRONIC DATABASES AND SUBSCRIPTIONS TO ONLINE SERVICES
- Electronic databases
• Online (Internet) services (Lexis Nexis, Aktex, Dialog, etc)

OUTSOURCED COMMERCIAL SERVICES
• Subscriptions to current awareness services, document delivery services, inter-library loans, etc
• Additional charges on items like photocopies, document delivery etc.

COUNSEL OPINION AND ANY OTHER INFORMATION RESOURCE THAT IS REQUESTED BY A PRACTITIONER IN THE COURSE OF HIS WORK. This includes any resource which is paid for by the organisation or is charged to a client account but which is saved and organised as a corporate resource

MISCELLANEOUS ADMINISTRATIVE EXPENSES
• Book binding and repair
• Stationery and equipment that is exclusively requisitioned for the library.

SALARIES, WAGES, REMUNERATION
• Salaries of permanent staff
• Wages of contract workers
• Expenses on professional support such as training, conference fees, membership of professional organisations

Data capture

1. Library software like InMagic may capture expenditure on books, journals, looseleaf subscriptions and electronic publications and reports can be generated to reflect this expenditure. Other information products and services will have to be captured separately.

2. A sound business approach is to capture data using spreadsheet software like Microsoft Excel or Lotus 1,2,3. Excel for example can record transaction date, department for which purchased, description, type, invoice particulars and payment details. The advantages of a spreadsheet programme are powerful computational capability and flexibility with regard to printing reports. This is useful for printing records for each department that lists the expenditure by type (eg books, looseleaf subscriptions, etc) within a given period.

I will be happy to e-mail an example of a worksheet in Excel that you can adapt for your own requirements.

3. Some items may not have been treated as library expenses in particular organisations, but they are properly regarded as information products and services and should be brought into the survey. These include Counsel Opinion and online departmental subscription services like Aktex and Questel-Orbit. Monitoring these expenses may require some ingenuity, but if you succeed you will be sending a clear signal to your principals that you see your role in the wider context of information management.

Thank you for your support in launching this first Information-Spend Survey. I hope you will discover that it is a worthwhile exercise, both in the monitoring of your own corporate information-spend, and in the opportunity it creates to benchmark the activities of South African information professionals.

Please contact me with criticisms of this survey and suggestions for future projects.

[The instructions relating to Counsel Opinion were amended by mutual arrangement when it was agreed that this data was difficult to capture. The analysis form was then modified.]