

## **Budget Project**

Group 7

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Libr 266

San Jose State University

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### **Library Background Information:**

Our law library services a private general litigation practice law firm in California with 21-25 attorneys, approximately five paralegals, three librarians, and four additional library support staff. Additionally, the firm typically hires two to three law school associates during the summer. These summer associates utilize library staff, services, and resources heavily during June, July, and August.

The firm's resource needs primarily consist of California materials: primary and secondary law (cases, statutes, regulations), analytical materials (journals and law reviews), practice guides, forms, news and business information, public records, etc. Additional need exists for access to Federal and the other 49 states' primary and secondary law (cases, statutes, regulations, etc.) from time to time.

The ideal collection is made up of diverse materials in order to best serve the law firm's needs. The library collects print resources, including books, magazines, newspapers, and journals. The library also subscribes to electronic subscription services as well as collecting electronic materials like CD-ROMs and software. The library is beginning to collect audiovisual materials in earnest to enhance the collection.

The following collection budget for 2007 is a summary of materials costs only. Costs for processing, cataloging, and other services are not included. A 10-12% inflation rate is projected for 2008.

**Budget Spreadsheet:**

<b>Categories</b>	<b>2007 Budget</b>	<b>Billed to 406700</b>	<b>%</b>	<b>PT (Aug) 406700</b>	<b>PT (Aug) 406700 %</b>
<b>Print Materials</b>					
Books (including Thompson West)	10,000.00	5,580.00	55.80	8,370.00	66.67
Print Journals	3,000.00	999.96	33.33	1,499.94	66.67
Magazines	1,000.00	999.96	1.00	1,499.94	66.67
News	1,000.00	999.96	1.00	1,499.94	66.67
<b>Electronic Resources</b>					
EBSCO Legal Collection	150,000.00	150,000.00	100.00	225,000.00	66.67
EBSCO Newspaper Source	200,000.00	199,992.00	100.00	299,988.00	66.67
Lexis/Nexis	100,000.00	99,996.00	100.00	149,994.00	66.67
WestLaw	118,000.00	117,684.00	99.73	176,526.00	66.67
CD-ROM/Software	5,000.00	4,992.00	99.84	7,488.00	66.67
Video	30,000.00	30,000.00	100.00	45,000.00	66.67
Audio	10,000.00	9,996.00	99.96	14,994.00	66.67
Continuing Education	14,000.00	13,992.00	99.94	20,988.00	66.67
<b>Totals</b>	<b>642,000.00</b>	<b>635,231.88</b>	<b>98.95</b>	<b>952,847.82</b>	<b>148.42</b>

**Justifications:**

**Print Resources**

**Breakdown:**

1. Books (including Thompson West): \$10,000
  - a. The library contracts with the vendor Thompson West in order to acquire the most current and up-to-date law books, statutes, cases, practice guides, forms and treatises, a critical necessity for a law firm. The 2007 contract with Thompson West runs \$5,580 and includes additional copies of some materials on CD-ROM titles in addition to the printed version. Additional funds are included in the book budget for purchases from other vendors without ongoing contracts, as well as reserving money for any patron requests.
2. Print Journals: \$3,000
  - a. Up-to-date law journal materials are important to law firm staff, and many employees have shown a preference for print browseability in addition to searching articles on demand electronically.
3. Magazines and Newspapers: \$2,000
  - a. Law firm employees appreciate the ability to stay informed on current legal, political, national and world events. The staff at the firm find benefit in reading and browsing print newspapers in addition to the ability to search for specific articles.

Total: \$15,000

## **Electronic Resources**

### **Breakdown:**

1. EBSCO Legal Collection: \$150,000
  - a. EBSCO's Legal Collection is a comprehensive compendium of legal journals. Subscription to this collection covers common and obscure legal journals and offers access to many more resources than we could hope to purchase or store in print. The electronic interface also facilitates easier article searches, and returns the full text of the article, not just a citation.
2. EBSCO Newspaper Source: \$200,000
  - a. Newspaper Source is a collection of domestic and international newspapers as well as transcripts of radio and television materials. This extensive collection supports the apparent patron interest in newspapers and provides access to domestic and international news and current events. Of particular note is the availability of radio and television transcripts; many of the programs included would be of interest to the legal staff.
3. Lexis-Nexis: \$100,000
  - a. Lexis-Nexis is one of the leading providers of online legal information. It provides up to date and archived business and news information, as well as case summaries and congressional bills. It is an essential part of any functioning legal institution and is supplemented with the use of the Westlaw database as well.
4. WestLaw: \$118,000
  - a. Frequently, law firms and corporate legal departments have both Westlaw and Lexis available to the librarians and lawyers for research. Some places only have

one or the other service, typically depending on budget and user preference. In order to remain competitive, the library offers both.

- b. Westlaw California National Litigator Premier includes all California primary and secondary law plus analytical and related California materials as well as Federal primary and secondary law and 50 state primary and secondary law.

Total: \$568,000

### **CD-ROM, Software, Audio/Visual and Continuing Education Resources**

#### **Breakdown:**

1. CD-ROMs/Software: \$5,000
  - a. The library offers some of the collected print titles also available in CD-ROM format in the physical library, as different attorneys prefer different formats for their research. Also, when the summer associates are around, these books and CD-ROMs are good, cost-effective reference sources for the new attorneys to brush up their skills on certain subjects. CD-ROM format offers additional access to a resource if the print edition is already in use by another patron.
  - b. The library would like to supplement the collection with software offerings. New developments in legal software include training packages and interactive courtroom trials, and would benefit both new and experienced attorneys.
2. Video/DVD: \$30,000
  - a. The library would like to begin collecting video materials in earnest. This is the library's first substantial investment in audio/visual materials, therefore the initial investment is higher than the expected future yearly cost. Video materials will be collected on DVD whenever possible, including commercially produced films and documentaries, television programming and segments (such as Nightline and

20/20), trial coverage (from sources like CNN, Court TV, and CBS News) as well as instructional and educational videos.

3. Audio: \$10,000

- a. The audio collection will include materials such as court recordings and legal debates.

4. Continuing Education: \$14,000

- a. The library's subscription to WestLegalEdCenter allows attorneys to complete their mandatory continuing education requirements online on their own schedule without incurring travel costs. The firm's employees average about 250 CLE hours per year. An additional benefit of the West package is the partnership with the Westlaw subscription, allowing users to link seamlessly between the two services.

Total: \$59,000

Budget total: \$642,000

### **What We Learned**

On this project we experienced the difficulties of having to come up with real world estimates for a hypothetical library. It was necessary to come up with a realistic situation in order to be able to make accurate estimates. Two out of three of us had no prior experience with legal libraries or law firms, so it was difficult to say which items would be mandatory, which would be desirable, and which should have priority. We came to the conclusion that lawyers often need to be appraised on the most recent events, and appreciate having a variety of accessible news

sources. For this reason we included many sources of news publications, including newspaper subscriptions as well as online databases such as EBSCO, Westlaw and Lexis-Nexis. These databases are also very important since they contain historical case information, which lawyers use to refer to prior precedents.

It was difficult to obtain some of these real world estimates for the cost of these databases, since that information is somewhat protected. We found that it is easy to find information about academic subscriptions to these databases, but much harder to obtain realistic law firm type estimates. One of us actually contacted Lexis-Nexis and was told they would not give an estimate to anyone without a valid business license.

We learned that budgeting is very much an art that requires experience in a real situation before it can be done properly and realistically. It seems like something that is a sink or swim type issue. We would like to think that we would be able to successfully budget in a real world situation, but when there are too many unknowns or hypotheticals, it makes it much more difficult. It might have been easier if we were given a situation and a maximum budget allotment instead of having to invent the situation ourselves. Just trying to live within a budget using real world costs would have been a challenge that might have turned out better. As it stands, we now have a cost list, but no real way of knowing if that bill is over- or under-budget, or if our estimate is even remotely in range of a real law firm library budget.