

**American Association of Law Libraries
Committee on Relations with Information Vendors**

**REPORT: Bureau of National Affairs, Inc. (BNA) Site Visit
March 15-17, 2001**

Overview

CRIV visited the Bureau of National Affairs, Inc., on March 15-17, 2001, armed with enthusiasm and the usual host of AALL members' questions. This year, we did not have a Best Practices subcommittee at the site visit, but we were able to address some best practice issues within specific topics. The end of the visit brought exhausted, but pleased CRIV members. Although not all of the membership's issues were resolved, BNA and CRIV were able to start a dialogue on library concerns which will extend well into the future.

Once again, the CRIV would like to express its sincere appreciation to Paul Wojcik, President and Chief Executive Officer of Bureau of National Affairs, Inc., and all the other BNA staff members who so graciously took time out of their busy schedules to meet with us and discuss the concerns that have been raised by our organizational members. We felt that this was a mutually productive and helpful meeting.

Site visit reports will be published in the May 2001 issue of the CRIVSheet and are provided here to inform the membership as quickly as possible of what was discussed and learned.

- CRIV Chair Chris Graesser provides a succinct description of the site visit process, explaining the goals, expectations and procedures that accompany any visit.
- Michael Beaird and Michael Saint-Onge present the flavor of BNA by describing the organization of the company.
- Stephanie Edwards and Anne Myers tackle that oh-so-popular topic of customer service. As many librarians have noted, BNA's "recent" advent into electronic publishing has not been without difficulties. BNA is fully aware of customers' concerns, and is anxious to address them.
- Margaret Maes Axtmann, Claire Engel, and Carol Rogers focus on the hot topic of the visit -- electronic products. A significant segment of the CRIV's visit was devoted to discussion, analysis and evaluation of BNA's current licensing scheme. This article also addresses contract negotiation and service requirements on electronic subscriptions.
- Stephanie Edwards and Anne Myers return to discuss BNA's business systems and how it impacts billing. They also provide information that will make it easier for librarians to work with BNA's existing business system, while customers wait for it to be replaced or updated.
- Chris Graesser and Janice Anderson review pricing questions for BNA Books, and Sara Galligan addresses delivery issues for BNA products outside of the BNA Books line.

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48 Hours in the Life of the CRIV

Despite the fact that CRIV issues reports on all of our site visits, they still seem to be a bit of a mystery to both librarians and publishers. So I thought I would give you a taste of 48 hours in the life of the CRIV, as its members met for a site visit in Washington.

Day One

The committee met in the afternoon to go over the comments from the survey we posted on law-lib and other listservs a month previously. A member of the Site Visit Committee had organized the comments by the categories you will see in the reports. From this list, we discussed what topics deserved the most attention, and groups of committee members were assigned to take the lead on discussions of these topics at our meeting the next day with BNA.

That evening we had a reception and dinner with senior executives of BNA. The CRIV has found that an informal reception prior to a sit down dinner provides an excellent opportunity for CRIV members to ask more specific questions and also to get a sense of who does what in a company. It is a great way to get discussions going, and also to help the publisher representatives relax. Believe it or not, publishers get very nervous when the CRIV comes to visit, and BNA took this visit very seriously.

Day Two

Bright and early, the CRIV sat down with BNA managers and pursued an agenda based on the librarian survey. We had a tentative schedule that allotted a minimum amount of time for each topic, but all participants were aware that the schedule was flexible. As discussions occur, particular ideas or facts may require more attention. We constantly adjust the schedule to accommodate the additional interchange. The meeting ran all day, with a few breaks, which tended to be spent in more discussions among individual BNA folk and CRIV members.

The tone of the meeting with BNA, as it has been in previous site visits, was cordial but frank. BNA President and CEO Paul Wojcik opened his introduction by admitting that BNA had some work to do to improve their customer service and billing systems (see more about that in the other reports). The better part of the day's discussions was spent on electronic product issues. When we broke for lunch, the committee took the opportunity to "huddle" and discuss among ourselves how we felt the talks were going. We agreed that there were unresolved issues, and asked that some of the BNA managers stay on to answer more questions. The CRIV feels keenly our obligation to our colleagues to get real answers and find truly useful solutions.

Invariably, something comes up during these meetings where the publisher says, "We had no idea librarians felt this way." Even though such things might come up on law-lib or with a sales representative, sometimes the message does not get through without a little face time with the managers who rarely interact with librarians. Probably the number one issue we volleyed back and forth was the concept of concurrent user licenses. Even though concurrent licensing is an accepted practice with some other publishers, it presents a major paradigm shift for BNA. The CRIV does not expect to convert every participant to our point of view at site visits; we are sometimes content to plant a seed in the thoughts of publishers.

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By the end of the afternoon, we were completely off schedule, but felt we had been able to pursue most of the subjects to the point where BNA understood where librarians were coming from and the CRIV understood the challenges BNA faces in providing quality information products. We had another dinner with a smaller group from BNA, which allowed for some follow up conversations.

Day Three

A site visit provides the CRIV with a valuable opportunity to establish an honest, working relationship with a publisher, but it does not begin or end there. On the morning of Day Three, the committee met to review the meeting and to decide what we wanted to report to AALL members. We also strategized on how to keep the relationships we have established with the publisher going in a way that will benefit librarians. In the case of BNA, the publisher is very interested in establishing a Librarians Advisory Panel to help BNA as they plan their new billing system and continue the major reorganization currently in progress. The CRIV regards this as an excellent opportunity to provide input with a publisher before problems arise.

Who Pays?

AALL and the publisher split the costs of site visits, which include travel, hotel and food. I'll be honest; the publisher foots most of the bill, because AALL can't afford to pay for it all. Mindful of this conflict of interest, the CRIV is exploring other opportunities to interact with publishers for the benefit of librarians. To that end, we have done "reverse" site visits where publishing executives visit libraries, and we are also inviting specific divisions of publishers to meet with us at the AALL annual meeting. But there is no substitute for visiting publishers on their own turf. Key people who don't usually attend AALL can be on hand at the publishers' headquarters, and the CRIV can gain valuable insight into the corporate culture and structure of a company.

By taking the time to travel and prepare for a site visit, the CRIV and AALL make a statement to publishers that we are dedicated to finding productive solutions to the challenges that face both the profession and the business of legal information. The CRIV is composed of librarians with a real interest in helping their colleagues. While we do not pay the monetary costs, we do take time from our own jobs and private lives to make these visits. Yes, a conflict does exist, but the CRIV recognizes it and more than compensates, as publishers who have hosted site visits can attest.

**Chris Graesser, Chair
Brown, Rudnick, Freed & Gesmer
Hartford, CT**

Organization Structure

The Bureau of National Affairs, Inc. is a leading publisher of print and electronic news and information, bringing to corporate and government leaders in diverse fields intensive coverage and analysis of legislative and regulatory developments. The company has a long and interesting history.

History

Originally a part of U. S. News Publishing Company, BNA started in 1929 as a news division that sent journalists to attend congressional sessions and federal administrative hearings and to report on what they learned. As the US government

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grew, so did the need for accurate and impartial reporting. The Bureau of National Affairs filled that niche.

During World War II, BNA experienced significant success by creating some of the titles that reported on daily events related to the war effort, including Daily Oil Report, Daily Production Report and Daily Price Report.

After the war, Dean Dinwoodey, a senior editor at BNA, got other senior editors together and accepted an offer to jointly purchase BNA for \$600,000 with \$10,000 down and the balance payable over eight years. From the start it was understood that its employees would own the company, making it the oldest wholly employee-owned company in the United States.

Soon after the purchase, the editors began preparing for publication a book on the Taft-Hartley Act, seminal legislation in the area of labor relations. When President Truman vetoed it, BNA gambled that the veto would be overridden by Congress-- and continued its printing. When the veto was indeed overridden, BNA had a book in the marketplace immediately and it sold over 20,000 copies. This early success bolstered the fledgling company, fostering its reputation as the place to go for legislative and regulatory information.

By focusing on impartial reporting of information in a timely manner, BNA's credibility on Capitol Hill continued to grow. In the last 55 years, the company has grown and expanded while remaining focused on its primary objective: helping professionals cope with government rules and regulations. Its publications now span the subjects of labor, the environment, intellectual property, antitrust, securities, and many others.

Employee-owned

Employee ownership has served as a bedrock of the company since 1947. This has a number of ramifications on the way they do business: They do not have to report to a share-holding public demanding quarterly and annual results. They try to see the long-range implications while making decisions, and are willing to forego quick profit for long-term investments that will bear fruit at some future date.

In addition, employee ownership has contributed significantly to the stability of its workforce. CRIV members were struck by how many employees had been with the company for a substantial number of years. The feeling among the staff is that of a family, which contributes to the sense of overall job satisfaction.

Employee ownership also means that every employee, from customer service to the CEO, has a vested interest in the success of the company. Problem resolution and customer satisfaction take on a whole new meaning when you are working with people who have a stake in the company.

The downside of employee ownership is that BNA is not a huge international corporation with billions in assets. (BNA brings in about \$300m a year in revenue.) Company spending must be more cautious as there is much less room for costly mistakes. In addition, the extensive reporting process, conducted with the highest possible quality control features guaranteeing accurate, unbiased reporting, is expensive.

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With about 2,000 people in the company, BNA devotes over one half of its revenue to employees and their benefits. About one third of the workforce is devoted to operating the editorial division, with the remaining two thirds comprising circulation, printing, infrastructure and administrative functions.

Organization

There are seven companies under The Bureau of National Affairs, Inc.'s umbrella, the largest of which are BNA, Inc., and Tax Management Inc. (A small but important department within BNA is BNA Plus, which is a research service with document delivery.) BNA International, based in London, maintains its own separate editorial and marketing departments. In addition, BNA owns its own printing facility, McArdle Printing Company. The company known as Pike and Fischer, familiar to many law librarians for its focus on communication law, was acquired in the 1980s. Recent acquisitions probably more known to the private law library sector include Kennedy Information in New Hampshire and Institute of Management and Administration, Inc., of New York. Both are publishers of newsletters of interest to the professional community.

BNA's philosophy on acquisitions is to acquire publishers with complementary content that remain focused on high quality reporting to their markets. Rather than integrating these companies into the overall BNA structure, they continue to run as separate companies with separate editorial, accounting and customer service structures, thereby avoiding the significant problems many other publishers have faced when trying to bring acquisitions into the corporate structure. BNA's organizational goals are: 1) to remain independent (employee owned), 2) to grow, especially by acquisition of content companies, 3) to grow their own content.

For about 55 years, BNA has been a successful print publisher organized along traditional lines (editorial, circulation, and production) but the migration of delivery to electronic formats is forcing it to reexamine the way it does business. (About 45% of its revenue now derives from electronic delivery.) The addition of electronic publishing to traditional print publishing has brought about the need to restructure into business units (projected to be completed this summer), and has encouraged management to create a customer contact center under the VP for Sales and Marketing to ensure that customer concerns are dealt with in a timely manner. This reorganization will allow them to focus more attention on the pricing and delivery of electronic products, especially licensing issues. Based on the comments we received from the membership prior to the CRIV visit, this particular area was of interest and concern to many AALL members. As this reorganization is completed, BNA will be in contact with CRIV to help spread the word and to answer any questions and concerns that surface along the way.

Conclusion

BNA's President and CEO, Paul Wojcik, and its senior management devoted the entire day to meeting with CRIV. It was clear to CRIV members during our visit that the executives at BNA see CRIV as a valuable tool in helping them identify and address these customer concerns, and the opportunity for these two entities to work more closely together should result in higher customer satisfaction.

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Customer Service

During our site visit to BNA in March, CRIV had the opportunity to discuss BNA's customer service and support operation in considerable depth with Pat Swords, Vice President for Sales and Marketing, Donna Ives, Director, Customer Contact Center, and Gary Seltzer, Manager, Circulation. Our dialogue focused on the impact of technological and marketplace changes on customer service expectations, managing law library accounts, the recent experience of AALL members with BNA customer service (as reported in surveys done by CRIV before the site visit), and the significant changes BNA is now making in its sales organization and staffing to improve its responsiveness to customers.

BNA began an in-depth review of its entire customer service and support functions one year ago. The review has led to a major structural reorganization, which BNA took the opportunity of CRIV's site visit to announce. Historically, the company has focused on production first and foremost, and in a simpler era, good customer support followed. In conducting a reorganization of its sales and support functions, BNA acknowledges that timely delivery, support and resolution of customer service problems are fundamental components of its product quality.

Current Organization and Staffing

Currently BNA's core customer service operation is the customer relations unit whose staff answers the 1-800-372-1033 number and handles the customer email account, customercare@bna.com. The staff of 35 plus 4 managers handle all matters dealing with account inquiries, billing, orders, fulfillment issues, and electronic product access. Customer relations will forward calls to other customer contact units as needed for technical or product specific issues. If you do not have a question answered satisfactorily, you should ask to speak to a manager.

Because customer care at BNA is currently splintered into different units and departments, overall effectiveness is greatly reduced and too often results in a "disconnect" for customers who need immediate resolution of a problem. Although the current organization emerged from a fairly traditional division between print and electronic sales, support, circulation and billing, BNA now realizes that this model is falling short of meeting customers' needs, especially with the growth of electronic products and all of their attendant support and service issues. Customer service units often perform parallel tasks, or hand account problems back and forth across departments. Not surprisingly, customers sometimes receive different information from different units, and problems are not always resolved in a timely fashion. This type of experience was evident in a number of the comments CRIV received from AALL members.

Customer Care Restructuring

After a comprehensive review that began last spring, BNA is consolidating all of its customer service teams in its Rockville, Maryland center. The transition is already underway, and BNA hopes to have the first stage, relocating the units, in place by the end of June 2001. Under the new structure, which brings together everything from sales to technical and customer support, customers will be routed directly to

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unit specialists for immediate resolution of problems. The initiative marks BNA's commitment to meeting the needs of its library customers instead of attempting a simple "band-aid fix" (BNA managers indicated that they already had many "band-aids" in place, and it was time for a new approach).

Under the reorganization, the new division will have three components, in close physical proximity to one another: I. Sales; II. Contracts (enlarging the group which currently administers contracts exclusively for electronic products), and III. the Customer Contact Center. The new Customer Contact Center and how it will operate became the focus of our discussion on improving service to our membership, inasmuch as BNA believes that it will more effectively address the needs of law libraries.

As it was explained to CRIV, the Customer Contact Center will be comprised of four units that will work in close coordination to handle the following:

- **Customer Outreach** - For follow up with the customer on "after the sale" issues, including training.
- **Customer Service** - To handle questions and problems relating to circulation, subscriptions, accounts/billing, and technical and product support.
- **Account Management** - Designed to support large customer accounts for both print and electronic products. Some of these customers will be assigned individual account managers at BNA to respond as needed to specific changes or requirements. BNA has implemented a pilot program with 80 customer accounts to date, and plans to add additional customers in phase two of the program. BNA will initiate contact with large accounts as the program expands and trained staff are available to provide effective support.
- **Processing** - Includes standard non-contract electronic billing, fulfillment (i.e. compiling and shipping products to the customer), and an Electronic Customer Sign-on group to assist with username and password problems.

What to Do Now

Until the new organization is completely in place, customers should continue to call 800-372-1033 for problem resolution. While this is the single best conduit into BNA for customers, there are several "direct" 800 numbers if you already know exactly which group you wish to reach:

- **BNA PLUS** at 800-452-7773 or by email at bnaplus@bna.com is available to answer product content questions, do research, and provide documents.
- **BNA Software's** technical support group may be reached at 800-424-2938.
- **BNA Books** has its own customer service unit, which can be reached at 800-960-1220 or on the web at <http://www.bnabooks.com>.

As many law library customers already know, the most efficient way for BNA customer service to search its system is by account number, which will differ from title to title. Having that number ready whenever possible when you call with questions or problems will facilitate resolution. However, if you do not have the

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number handy when you call, there are additional access points which will work but may be more time consuming.

In discussing the concerns of law library customers over ongoing subscription and account problems, BNA stressed that if customers are not satisfied with the way their problem is being addressed, they should not hesitate to bump the call up to a supervisor, or to Heidi Clemmer, Manager of Customer Relations. She can be reached by email at hclemmer@bna.com or by phone at 301-294-6607.

BNA agrees with CRIV that it is important to communicate with library customers about changes affecting customer relations. They will therefore be working with the CRIV committee to communicate changes as they take place, using CRIVGrams and other means.

Training

Comments we received from AALL members noted concerns with turnover of customer service staff at BNA. CRIV asked customer service managers about this perception, and also inquired about the training given to new staff in their departments. Gary Seltzer, Circulation Manager, indicated that at present, there are approximately 40 people working in the BNA customer service unit. Despite a 50% turnover in staff over the last three years, there are upwards of 15 staff members who have logged more than 15 years experience each. Interestingly, most of the customer service staff who left transferred to other departments within BNA, bringing with them valuable customer service experience and orientation.

New customer service staff receive intensive training on BNA products for several months, and do not begin taking calls until the end of their third month. Thus, a fairly broad knowledge of the various BNA products is expected by the time the staff begins to field calls. During the fourth through sixth months on the job, trainees are monitored very closely as they take calls. There is always a senior group leader nearby if staff cannot answer a question or resolve a problem. In addition, there are two supervisors located within the unit. As noted earlier, customers should not hesitate to involve customer service supervisors if their expectations are not being met on an initial call.

AALL members may have felt frustration that on each call to BNA it seemed they had to start from square one because BNA had no record of earlier calls, OR that when they inquired, they were told that there were no other complaints about a particular problem. In fact, because of systems limitations, BNA does not have the capability of logging or archiving customer comments, either by customer or by product. Staff therefore have to rely on communicating with one another in person and by email as they become aware of problems with particular titles or accounts. BNA acknowledged to CRIV that their system is inadequate in this and other respects. They are committed to building a knowledge management database to maintain and track this kind of account and product information. CRIV made a recommendation that information about products, particularly where it relates to known problems or delays, be made available on BNA's website, and BNA was receptive to that idea.

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**Anne Myers
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Electronic Products

The largest number of concerns expressed during CRIV's solicitation for comments for the BNA site visit centered on their electronic products. Issues raised included concerns about web licensing, pricing of web products, archiving and ownership of web and CD-ROM products, CD-ROM platforms, various technical problems, and training.

Licensing

Easily, CRIV received more comments on electronic licensing than on any other category. Currently BNA has four basic models for licensing its electronic products. **It is important to note that these are models only and that BNA stresses that each library should negotiate its needs.**

LICENSE TYPE CHARACTERISTICS:

Library License: <ul style="list-style-type: none">• Only 1 librarian or researcher has full web access• E-mail is routed to end-users• End users must request full articles from the librarian,• Librarian retrieves the article and forwards it to the end user
Specific User License: <ul style="list-style-type: none">• Named users each with individual usernames and passwords
Site License: <ul style="list-style-type: none">• Access is for ALL users at defined locations• Customers may license one or all locations• Locations are written into the license with the full address• A maximum user cap is set and written into the license• ONE user name and password for ALL users and ALL titles
Enterprise License: <ul style="list-style-type: none">• Access is for ALL users at ALL locations• All locations are included in the license, but not written into the license• A maximum user cap is set and written into the license• ONE user name and password for ALL users and ALL titles

BNA is currently developing a licensing model for academic law libraries. This will be presented to NELLCO (New England Law Library Consortium) in the near future for their feedback. BNA hopes to roll out a licensing model to the law schools within the next several months.

A number of libraries, regardless of type, expressed a strong desire to see BNA implement a concurrent user license. Unfortunately, at present, BNA does not have

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the technology to implement concurrent user licensing. However, if your organization has the technological capabilities to cap the number of users, BNA is willing to negotiate a concurrent user license with you.

For those concerned with the high cost of providing library/librarian access, BNA will provide access to a designated library recipient without that recipient counting as a user under all of the licensing agreements except the Library license. However, to obtain this access, you must articulate the need and have it included in the agreement. We suggested to BNA that library/librarian access should be considered the "norm."

BNA's reorganization (see Organization section) will impact licensing. The reorganization will bring together its licensing functions, including billing for the licenses. This new arrangement will speed the licensing process.

Customer Support

The reorganization will also bring together customer service and support for web products. BNA's goal is to have a centralized location for all customer concerns.

BNA does not presently have the technology in place to provide statistics regarding the number of hits each web product receives.

Pricing

Pricing issues were a common concern in relation to electronic licensing. With frequency, librarians voiced concern about the high cost of electronic materials. BNA responded that unlike most other legal publishers, they have always been and continue to be a content creation company, which requires the high cost of maintaining a corps of experienced reporters. In addition, as with our own organizations, BNA has had to develop and/or add the technology necessary for electronic information. Their information technology department began about fifteen years ago with five people. Currently there are approximately sixty-five staff members. Carol Clark, Acting Director of Information Technology, shared with us the need for and costs associated with T3 bandwidth, backup lines, routers, hubs, servers, software, significant hardware infrastructure, royalties for search engines and other software, and the ever-growing need for expanded skill sets for staffing.

CRIV also discussed with BNA pricing discounts on print versions of the electronic products. Standard discounts are given among each of the pricing models referenced above. Print copy retention is not required. However, if you wish to retain print, the standard discount given in connection with electronic licenses is a 75% discount on the first print copy of a notification service, and a 50% discount on additional print copies for every ten seats purchased. If the print service is discounted based upon an electronic subscription, at least one electronic user must be at the location to which the print is mailed.

Archiving and Other Technical Issues

Concerns regarding archiving were among the comments CRIV received. Librarians need to recognize the distinction between a purchase and a licensing agreement. We purchase, and therefore, own the print copy. We sign a license agreement for the use of electronic products. This does not entitle us to an archive. For those concerned about the ability to archive CD-ROM products, BNA reports that their December disks do not expire. For those concerned about archiving the web product,

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each licensed user/library can print and archive a hard copy of the newsletter publications. In the case of BNA's web reference library publications, consider negotiating receipt of the December CD-ROM for archival purposes.

Several technical issues were discussed. BNA has begun to offer IP authentication for site and enterprise license customers and stressed the need to test each new organization's IP address before going "live" to determine possible problems such as firewalls.

The CRIV received several comments regarding broken links. Broken links in emails are being addressed. BNA fixes broken links when they are reported and would encourage users to report any broken links they find to customer service. Often the broken links are associated with URL's that wrap. A fix is in the works for the problem.

BNA requests that electronic users contact customer service for any technical problems. Netscape users should talk with technical support about browser settings. BNA reported that they hope to have in place a dedicated group for electronic customer sign-on later this year. This group will replace the current Hoover's Site Administrator's page.

In reference to questions about differences in CD-ROM platforms, BNA reported that the only CD product with a different platform is Tax Management. All other CD-ROM products are based on the same platform.

CRIV expressed a concern about the poor communication librarians received about platform changes. BNA acknowledged the numerous problems encountered during platform changes and hopes to do a much better job of communicating any known or potential problems in the future. It was suggested that BNA establish a system to "broadcast" messages to electronic users when there are BNA system problems.

Training

Training issues were also discussed. CRIV suggested to BNA that they provide follow-up training three to six months into a new subscription so as to take into account new students and/or new hires at law firms.

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University of St. Thomas, Minneapolis, MN**

**Claire Engel
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**Carol N. Rogers
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Business Systems

The current systems configuration at BNA is--by BNA's own acknowledgment--complex, massive, messy, and antiquated. At its core is the Customer Accounts Records system which was written in COBOL in the 1960's. Importantly, it is strictly a transaction-based system (i.e. order-based), and not customer-based. This

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explains why customers have any number of individual order/account numbers for individual titles, and also why consolidated billing is not possible. There are approximately 250,000 order records in the system; the best estimate now is that this database represents 40-60,000 customers. There are 18 major data stores and myriad desktop applications and workarounds to supplement this system -- but it is clearly not sufficient to handle BNA's or its customers' needs.

Over the years, BNA has made multiple attempts to resolve the problems. No off-the-shelf software that meets BNA's specifications is available to replace it. Several years ago, some AALL members remembered hearing that a new BNA system was in the works, and that it would permit greater flexibility in billing and account maintenance. Nothing ever came of it. In fact, BNA did contract with an outside vendor in the mid-1990's to create a new integrated system, and assigned a number of BNA staff members to work full-time on the project for more than a year. Unfortunately, within a few months of a Go Live date, it became necessary for BNA to pull the plug, because the system was not stable or scalable enough to meet their needs. The disappointment within the company was considerable. This episode was followed in 1999 by a full year of Y2K remediation so that the old systems would continue to work into the new millennium.

In 2000, BNA formed a Business Systems Management Committee, composed of representatives from various departments, with the purpose of bringing a team approach to the problem of replacing current systems completely with a new workable system. Cindy Bolbach, director of the committee, said that they are viewing this crucial project "not as an IT, Sales, Marketing, Billing, or Customer Service problem," but as a "BNA problem."

Thus far the new committee's mission is two-fold:

1. To identify short term "bleeds" that it will be necessary to fix in order to keep the existing systems going and other short-term enhancements they cannot wait for (e.g., creating a contracts database and a database to handle all of their e-mail notification service subscribers), and
2. To find a long-term solution to systems needs and develop a plan for its implementation (using an incremental approach).

Right now they are gathering requirements for a new front-end order-entry system and plan to decide whether to develop a new system or customize an off-the-shelf system by the end of the year. After the new order entry system is up and working they will turn their attention to other pieces of the puzzle. According to Cindy Bolbach, a single account number and consolidated bill will not be available to customers until mid to late 2002 at the earliest.

It is important to remember that the BNA Books division of BNA has its own independent order entry, billing, fulfillment, and customer service operations. The BNA Books accounting system is fairly new, and does not have the limitations of the system described above. See the BNA Books section of this report for more information.

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BNA Books

BNA Books is a division of The Bureau of National Affairs, Inc. Among its subject specialties are employment law, employee benefits law, labor law, intellectual property law, health law, legal practice and environmental law. The division publishes about 40 main volumes and supplements per year. Organizationally, BNA Books has been folded into the Legal Publishing Group, but the two management systems will remain separate for now and for some time into the future. This is partly because of the significant differences between how standing orders are processed and how subscriptions are processed. Therefore, BNA Books will not be part of the imminent changes described elsewhere.

The survey of AALL membership that was done prior to the site visit turned up several issues of concern to our members. At the top of the list were the high prices of the books. As examples, Employee Benefits Law and The Fair Labor Standards Act were singled out as being priced egregiously high. Richard Cornfield, Executive Director of the Legal Publishing Group, detailed the process that produced Employee Benefits Law and its 2000 Supplement. He will explain in an addendum what generally determines the prices of their books. This particular publication's high price was caused by the extraordinarily lengthy and complicated process of putting the book together, which involved many authors from the Labor & Employment Law Section of the American Bar Association (ABA) plus one year's worth of work on the part of a full-time BNA Books editor. The Supplement, which was written by another large corps of lawyers, went through a similar process.

Sometimes, BNA books are adopted by law school professors as class texts. (The books are available to professors on a 60-day examination process.) If a book is adopted, the professor receives a copy without charge. When queried about whether the law school's library could also receive a free copy, BNA's response was affirmative: "Just ask."

The handling of standing orders is a source of confusion for some of our members. Be aware that it is BNA Books' policy that all of their books are automatically standing order titles. This means that new editions or supplements will be sent to libraries that have purchased earlier ones on approval, unless they had indicated that the previous purchase should be treated as a non-standing order. All titles can be returned within 30 days of receipt for a full refund or cancellation of all charges. A library can, of course, "opt out" of this service at any time by requesting that a title not be on standing order. Please be aware that if a library places another order for a publication that is already on standing order, it will receive a duplicate shipment. To avoid this situation, a library can request a list of titles that it has on standing order with BNA Books. To do so, contact Judy Davies at 202-452-4410.

The issue of updating books on the Web was raised by one of our members. According to Margret Hullinger, BNA Books Executive Editor, only one publication, Equal Employment Law Update, is being so updated at this time. Users can go to the BNA Books web site (www.bnabooks.com) and find a list of cases already identified for possible inclusion in the next edition of this title. In the future, BNA Books will notify past buyers of the affected titles when these updates are available. (Questions

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for librarians: Should we reflect this updating mechanism on the volume? In the bibliographic record in the online catalog?) For the future, BNA is looking at putting the books themselves on the Web.

The customer service operation of BNA Books is a separate operation from BNA, Inc. The phone number is 1-800-960-1220 and the email address is books@bna.com. Those who experience difficulties in dealing with their customer service people should not hesitate to take the problem higher within the organization. Margaret Hullinger will be happy to take phone calls directly. Before that, one can go to the web site at www.bnabooks.com and click on "FAQs" to find basic information, plus names and numbers. BNA Books has also issued a handy little "Customer Guide" leaflet that contains useful information about orders and contacts.

CRIV asked about the practice by BNA Books of putting accounts on hold for non-payment of an invoice. Margaret Hullinger explained that accounts, including all new or standing orders on a library's account, are put on hold for the following reasons:

- Exceeding a credit limit
- Non-payment of any open invoice within 4 months

CRIV pointed out a couple of problems with this system. First, that large institutional libraries would probably have problems making the 4 month deadline for payment. Second, that BNA was not adequately informing librarians placing new orders that the order might be delayed due to the account being put on hold.

Following the site visit, Ms. Hullinger looked into those issues and provided CRIV with the following information:

- Large libraries can arrange with Ms. Hullinger to set a higher limit that is mutually acceptable to BNA Books and the library.
- If there is a problem with payment of an individual invoice, libraries can call Ms. Hullinger for assistance. BNA Books is willing to be flexible on an individual basis.
- Currently, when a book is ordered, a confirmation is sent to the customer, which will provide notification if the account and the order are on hold. In addition, BNA Books will modify final statements so they will notify customers that their account is on hold and that future purchase orders for the entire library account will be affected.

Barring any unforeseen circumstances, BNA Books customer service representatives will let phone-in customers know immediately if their account is on credit hold. However, more than half of BNA Book orders are placed by mail. As a result, it would be difficult to immediately notify customers that their account is on hold when the order is placed. Therefore, librarians need to be aware of the status of their account by keeping close track of their payments and any notices they receive from BNA Books. If a library typically has a problem with overdue payments, the librarian should plan to ask about the status of the account as part of the ordering procedure.

Finally, BNA Books is planning to add a page to their Web site which will be devoted to librarians. The page will include information about purchase options, billing questions, accounts, etc. The folks at BNA Books wish to provide first rate service and they welcome our questions and comments.

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Brown, Rudnick, Freed & Gesmer, Hartford, CT**

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Print Products

The CRIV brought up a number of concerns relating to print products. These were based upon specific print product issues identified by AALL member input as well as print product issues that permeated through discussions relating to customer service, pricing, and account numbers. These areas are covered in other sections of this report dealing with customer service and pricing, as well as a separate section on BNA Books. One of the specific issues unique to print product delivery related to delayed receipt of some print products across the country. Due to the emphasis BNA placed upon it, a message that bears repeating here is that customers should always escalate a concern if they are not satisfied with the individual handling their request.

Generally BNA reported that 55% of their revenues still comes from print products. While the percentage is decreasing, the drop in demand is slow. BNA print products originate with the BNA parent company, which include the BNA Books Division and several subsidiaries. Other subsidiaries include Tax Management, Inc., BNA International, Pike & Fischer, Kennedy Information, and Institute of Management & Administration. (See the BNA website at www.bna.com for more information about these subdivisions). BNA also maintains its own print production facility, the McArdle Printing Company, Inc., which is also a subsidiary of BNA.

BNA emphasized the editorial excellence they strive for in both their print and electronic products. BNA is a content company and not a data company. They recognize that different talents are demanded by print and electronic formats to maintain quality. This also relates to how these formats are updated. Recognizing that many customers subscribe to both the print and electronic formats, BNA offers price reductions for print products. Some discounts are as high as 75% off the original print product price. Also, adding additional users to an electronic license helps reduce costs.

With regard to discounted print and electronic subscriptions, BNA detailed its policy on product location. If the print service is discounted based upon an electronic subscription, at least one electronic user must be at the location to which the print is mailed. For example, if a firm has a 5-user license to DTLN (Daily Tax Report on the Web), the firm is entitled to one print Daily Tax Report at 75% off of the full rate. If one user is in the Boston office, one user is in the DC office, and three users are in the Chicago office, the discounted print copy may be mailed to any of those three offices. It may not be mailed to the NYC office.

Delivery delays

One issue of concern to librarians was the delay in receiving some print products. Citing delays up to five days in receiving daily products such as the Daily Labor Report and the Daily Tax Report, librarians also indicated that the electronic version is sometimes not an option. BNA's response was that they aim for overnight courier delivery in 30 metropolitan areas all over the U.S. at no extra charge. If hand delivery is not available, the faster mail delivery is used at no additional charge. If

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you are uncertain as to your library's delivery schedule, contact BNA's Delivery Services group directly at 202-452-4575 or 202-452-4394, or you can call BNA's Customer Contact Center at 1-800-372-1033.

BNA provided a rough estimate of expected receipt times by geographic area. For example, East Coast overnight hand deliveries should arrive between 8AM and 10AM. West Coast hand deliveries can be as late 11 AM to 4PM, depending on a subscriber's distance from the airport. BNA uses an outside contractor, National News Corporation, for hand delivery. National News Corporation does have a toll free number available for customers to call to inquire about local delivery problems. The number is 800-367-1525 -- in the Washington, DC area only, call 301-985-6292.

Alternatively, if satisfactory answers are not provided by National News, BNA encourages customers to contact BNA's customer service at the usual customer service number (1-800-372-1033). Staff receiving these calls have been instructed to give them high priority. After resolving the immediate issue, they also should give the customer a follow-up call within 1-2 days to make sure that everything has been handled to the customer's satisfaction.

BNA encourages librarians to contact customer service for any problems they have with regard to print products. They indicated that their new customer support center would streamline customer service support measures. For the time being, they encourage librarians with inquiries about print products to have the item's account number handy.

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Dakota County Law Library, Hastings, MN**

**Michelle Wu
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