

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

REPORT: Mini Site Visit to William S. Hein

June 14, 2005

ATTENDEES:

Carmen Brigandi

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The Site Visits Subcommittee of CRIV conducted a mini site visit to the William S. Hein Company headquarters in Buffalo, New York, on June 14, 2005.

The Site Visits Subcommittee consisted of Carmen Brigandi, Larry Meyer, and Marcia Zubrow. Two subcommittee members, then CRIV Chair Ellen Strbak, of the Administrative Office of the U.S. Courts, and Gail McCain, of Fuller Henry, assisted with the preparations, but were unable to make the visit.

In early May, after the arrangements for the visit had been finalized, a CRIV-Gram from Chair Ellen Strbak was posted on various law library-related online discussion lists and was distributed via AALL Executive Director Susan Fox's "From the Desk of" e-mail. This CRIV-Gram served as an announcement to the AALL community that a site visit was to be held and encouraged members with questions, concerns, or other comments to forward those to the Site Visits Subcommittee. In response, many law librarians from all three types of law libraries took the time to send in their questions. Once received, it was apparent that most messages could be easily categorized into a few areas.

Most questions and comments concerned the Hein Online product. Other areas were microfiche, cataloger's Web, journals (agent), and monographs. Once compiled, without identifying information, the member feedback was forwarded by the subcommittee to Hein to give them an opportunity to prepare their responses.

Meeting with the subcommittee members to respond to member feedback and share the company vision were: Kevin Marmion, president; Daniel Rosati, senior vice president, research and development; Scott Fiddler, vice president, production; Richard Spinelli, vice president, sales and marketing; Brian Jablonski, director, marketing and publications; and Rudy Hein, director, customer service. Additional Hein personnel were introduced and met with CRIV during the day.

Hein Online

Content—Hein responded to questions regarding Hein Online's current and future content plans by mentioning that there were approximately 675 to 700 journals currently online with another 450 under contract to be added. CFR back files and U.S. Statutes at Large will soon be available—the first release of each was scheduled for prior to the July AALL Conference. By the end of 2005, the content of the Federal

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Register should be complete through the end of 2004. The group discussed the possibility of adding Congressional Record, including the Daily Edition, to Hein Online. Plans for a Federal Legislative History Library are progressing. Once introduced, the intent is to link the histories to Statutes at Large, journal articles, and other Hein Online content. The legislative history library will start with 20 of the more popular sets and expand based upon demand. The Hein representatives previewed the new databases for the subcommittee and demonstrated many of them at the AALL Annual Meeting.

Pricing—Hein shared that one of its concerns is the process of price increases and how to cover its increased costs. One of the suggestions from CRIV was to communicate the increases to its customers earlier, so they have additional time to budget for the following year. In response to a question regarding discount pricing for retired law librarians, Hein officials indicated that they would be more than happy to do so and encouraged retirees and soon-to-be retirees to contact them directly. Hein will continue to offer current consortium pricing for the foreseeable future. In response to questions regarding a pay-for-view or short-term billing, Hein will continue to explore the possibility, but has no current plans to change from its current yearly billing.

Online Searching and Printing—AALL members offered a number of suggestions and questions regarding improvements in searching. Hein replied by showing the subcommittee a beta test of its new search engine, which members were able to test at the July AALL Conference. It was agreed by the subcommittee members that this was a much improved and more robust search engine. Once in place, this search engine should allow subscribers to find their results listed by article title (not journal title) and page number.

Subcommittee members were asked for their feedback, to which they made suggestions that they would like to see incorporated into the new search engine. As to open urls and link resolvers, Hein expressed concern over its ability to protect its intellectual property. Hein did indicate that it would continue to research the matter further and would be open to any dialogue that would protect the company. During the last six months, Hein has rebuilt its PDF generator, which has resulted in an increased print speed on Hein's end. Additional print problems are most likely on the user's end. Hein encouraged those with print speed concerns to contact the company, and its technical people will try to help isolate the issue.

Additional Comments—Hein addressed member concerns as to its ability to promote Hein Online to its users without a brochure or other promotional material by indicating that it hopes to have such a product available before the end of the year. In response to a request to make its product compliant to Project Counter, Hein committed to being compliant within the next three to six months. Usage statistics will be available to subscribers. Hein is also able to provide statistics as to the number and types of subscribers to those who might be interested. Hein Online currently has subscribers in 74 countries. Subscribers in Third World countries have been offered low-cost and complimentary subscriptions.

Monographs and Serials

Approval Slips—Hein is currently beta-testing an electronic Green Slip service that will allow individual libraries to control their own profiles at the customer level. It will also allow the customer to order via an "order now" e-mail link. The online product

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will feature a 10-year archive of Green Slips. The first phase of the new system will not have an order tracking system. CRIV did indicate to Hein that a number of members had expressed that they would like such a system, and Hein indicated that it would consider adding order tracking in future phases. In response to a member's question as to how titles are selected for the Green Slips, Hein replied that all new law-related titles from essentially all publishers are included, as are reprints of government documents. Generally, government documents are excluded.

E-Journals—CRIV asked Hein about the possibility of notifying customers when a new issue is available. Hein responded that it would need to do more research, possibly checking with other vendors, as to how it might be able to implement such a program.

Monograph Orders—Hein explained that in the past it has sent publishers orders bi-monthly. In an effort to improve delivery time, it has changed to sending orders to the publishers weekly. One of the concerns expressed by members was finding out the status of an order. Currently, Hein follows up with publishers when a title has not been issued by the promised time. Hein will explore ways to include customer notification in the follow-up process, even if the status has not changed. As to duplicate orders, Hein hopes to have a new integrated customer service system operating within the next 12 months. This should help insure that orders are only entered one time, because some orders in the past have been duplicated when a customer checks on an order.

Claims Process—Hein sends out a monthly status report, which some members feel is less than effective. Hein will look at revamping this report to make it more relevant to each law library. Hein will also display its claims policy on its Web site and submit an article to *The CRIV Sheet* with a more detailed explanation of the process and Hein's role between the publisher and the customer.

Cancellations—Hein noted that it has two to three people handling cancellations and explained that many of the issues surrounding the cancellation of serials centered on timeliness. Hein serves as an agent. Customers need to cancel a title as soon as possible. Once Hein has paid the publisher on the customer's behalf, the chances of a refund are small. As to microfiche shipments, since Hein no longer stocks microfiche (it is created on demand), it cannot resell a shipment a library might wish to cancel. As to orders suddenly ceasing and related issues, CRIV suggested that many of the concerns could be addressed with better communication and, as noted above, the posting of policies on the Web site.

Microfiche—In response to the concern of some AALL members, Hein officials reiterated their commitment to the continued production of microfiche. Hein used this question as an opportunity to point out that if it has digitalized something a customer might want in fiche, it is able to print it on demand. They also cited examples of projects the company has undertaken, and will continue to undertake, where customers have approached Hein about producing a product with a sufficient number of orders to cover Hein's costs.

Cataloging Questions

ABA Archive—There were a number of questions regarding the status of cataloging for this microfiche product. Hein explained that by agreement, it cannot publish the

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three most recent years. Before the end of summer 2005, it will have a file out that will bring the cataloging current through the end of 2001.

Cataloger's Web—There were questions concerning the functionality and usability of Cataloger's Web and its tutorial. Hein responded that there are no current plans to update or change either. Hein encouraged users to contact Hein's technical support department with questions and requests for assistance.

Additional Topics

Hein was asked to elaborate on the process it used to decide which government documents will be printed. It responded that AALL has a committee that recommends born digital titles for printing, which it uses. It also takes recommendations and requests from customers. As noted earlier, Hein will produce a product requested by customers. Generally, 10 to 15 orders are needed before Hein can produce a special request. As to copyrighted works, such as treatises or digests produced by other publishers, Hein will microfiche them, if the company has a contract with the publisher. Hein will consider expanding its customer service hours to later in the day, allowing customers in other time zones more opportunity to call in and speak to a representative. Hein noted that its phone system also allows a customer to call in and speak to a specific person or alternatively leave that person a voice mail. As mentioned earlier, Hein will look at suggestions made by CRIV on providing more information for customers on its Web site. In addition to policies, those suggestions included updated product and product availability information and future enhancements once its new system is in place. In addition to discussing member concerns with Hein personnel, the subcommittee members received a tour of Hein's facilities. Marmion and Fiddler served as our primary guides. Marmion is in charge of the digitalization process. We were guided through the process whereby pages are scanned, visually checked for accuracy, as well as tagged and indexed. Once the process is complete, the pages can be added to Hein Online and/or produced as microfiche. Our guides explained that once images are stored, Hein can supply documents on demand. They noted that law libraries ordering microfiche can have the fiche customized if they so desire. The tour also included a look at the printing and binding process. Recently reorganized, Hein's production processing, i.e., digitizing, microfilming, printing, and binding, as well as packing and shipping, is all on one floor and appears to be extremely efficient.

Conclusion

Overall, the subcommittee felt the visit was a productive and positive experience. The Hein people had spent time preparing for our visit and also took an entire day out of their schedules to meet with us. Hein clearly wants to hear from its customers, especially specific concerns and complaints. CRIV emphasized on behalf of AALL members that the more information Hein can provide to its customers, the better. We wish to thank the company for making the arrangements as well as for its hospitality and sincere responses to our questions and comments. The subcommittee also wishes to thank past CRIV Chair Ellen Strbak and current Chair Kevin Butterfield for their help and encouragement in putting the visit together. Thanks also to the law librarians and other staff at University of Buffalo-SUNY for their kind hospitality to the subcommittee. Thanks to the many AALL members from all three types of law libraries who took the time to send in their questions and comments. Currently, the entire CRIV is scheduled to have a site visit at LexisNexis headquarters in the fall. Other vendors wishing to schedule a site visit during the 2005-2006 year should contact Larry Meyer, chair of the Site Visits Subcommittee.

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Hein Response

Kevin Marmion President, William S. Hein Co.

On behalf of the 120 employees of William S. Hein and Co. Inc., it was a true pleasure to host the CRIV members at our corporate headquarters in Buffalo, New York. The meeting was extremely productive and enlightening and provided us with an opportunity to learn even more about our customers' needs from the input of the committee members. While some of the issues raised by the committee had already been identified and were being addressed through various internal Hein employee committees, we are now actively reviewing our systems and procedures to address the new issues brought to the table by the committee.

We know that open communication is crucial to our being able to continue offering a high level of customer service to each and every customer, and we appreciate the committee members' work in facilitating such communication. After all, the success of any company is nurtured one customer at a time, and we hope that all of our customers, whether individually or collectively through CRIV, will let us know what else we can do to best serve the needs of their libraries.