

## **Part I – New Project Work**

### **Goal I-A. Reinforce our commitment to the Fair Business Practices Guide.**

#### **Flows from these Shared Principles:**

- We strive to maintain clear and transparent communication while understanding that we are each managing a business and owe duties of loyalty to our employers.
- We mutually commit to efficient business procedures and systems.

#### **Objectives**

- Seek a commitment from AALL members and vendors to the practices endorsed by the Fair Business Practices Guide.
- Revise and strengthen the Fair Business Practices Guide.

#### **Recommended Tasks**

- The AALL Executive Board will create an *ad hoc* group of representatives of existing entities within the organization to develop a process for achieving this goal.
- The AALL Executive Board will appoint a task force to review and revise the Fair Business Practices Guide.

#### **Responsibility**

AALL Executive Board, the Vendor Liaison, and appointees to the *ad hoc* group and the task force

#### **Timeline**

August 31, 2011: Appointment of the *ad hoc* committee

November 30, 2011: Appointment of the task force to revise the Fair Business Practices Guide

#### **Evaluation**

Reports of the *ad hoc* committee (by December 31, 2011) to seek commitments to the Fair Business Practices Guide and the task force to revise the Fair Business Practices Guide (by December 31, 2012)

**Goal I-B. Cultivate tangible collaboration on preservation and authentication, engaging stakeholders including government and court representatives.**

**Flows from this Shared Principle:**

We have a shared interest in the preservation and authenticity of legal information in all formats, including working with government entities on authenticity and preservation.

**Objectives**

Identify specific methods in which the issues of preservation and authentication can be addressed between vendors and libraries, as well as identifying key government and court stakeholders that can play a contributing role to identifying these methods.

**Recommended Tasks**

Designate a task force that can identify the key players in these areas, identify priorities, and determine which internal groups can be tapped to work on these areas as part of their normal charge.

**Responsibility**

Representative Vendor Colloquium participants and other committee members, as appointed by the AALL Executive Board

**Timeline**

Task Force appointments: August 31, 2011

**Evaluation**

- Input from Vendor Colloquium participants, the AALL Executive Board and the AALL membership by July 15, 2011
- Submission of a final report by May 31, 2012

## **Goal I-C. Identify and promote methods of demonstrating return on investment (ROI) and reporting usage statistics and metrics.**

### **Flows from these Shared Principles:**

- We have a mutual interest in developing guidelines and practices for measuring the usage of products and services, the return on libraries' investments in products and services, and the value of library services.
- We recognize the importance of collaboration as the most effective and respectful way to share information; such collaboration can result in mutually beneficial high quality products and services.
- We mutually commit to efficient business procedures and systems.

### **Objectives**

- Develop a shared understanding of statistics and metrics.
- Develop quantitative tools to demonstrate value.

### **Recommended Tasks**

The AALL Executive Board will create an *ad hoc* committee of representative librarians, vendors, and possibly statisticians to:

- Determine what statistics and metrics are required by law libraries with the rationale behind each;
- Determine whether the provision of such measures is viable;
- Brainstorm ideas on demonstrating ROI in terms that COOs, managing partners, deans, court administrators, and judges will appreciate.

### **Responsibility**

Representatives of PLL, SCCLL, ALL, and TS SISs, the Public Relations Committee, the Vendor Liaison, and vendor representatives

### **Timeline**

*Ad hoc* committee appointments to be made by August 31, 2011

### **Evaluation**

Input to the *ad hoc* committee from AALL members, submission of a report by June 30, 2012.

## **Goal I-D. Identify and endorse improvements to the procurement process that will benefit librarians and vendors.**

### **Flows from these Shared Principles:**

- We have a mutual interest in developing guidelines and practices for measuring the usage of products and services, the return on libraries' investments in products and services, and the value of library services.
- We mutually commit to efficient business procedures and systems.
- We strive to maintain clear and transparent communication while understanding that we are each managing a business and owe duties of loyalty to our employers.

### **Objectives**

- Develop suggestions for best practices in standard license agreement language, specifically identifying those perennial issues of concern to many AALL members (such as liability limits, non-disclosure clauses, and jurisdiction).
- Develop suggestions for best practices in digital rights management.
- Identify invoicing best practices, including critically important elements of an invoice.
- Study the impact of bundling practices on the various types of libraries.

### **Recommended Tasks**

- To the extent that resources are available already, promote their use (for example, the *Fair Business Practices Guide* and the *Principles for Licensing Electronic Resources*).
- Seek input from AALL membership regarding issues of concern in invoicing, contract clauses, and bundling practices.
- Develop a set of best practices for invoicing and boiler plate language for license agreements.
- Share the results with legal information vendors and via the CRIV website.

### **Responsibility**

- Assign an *ad hoc* subcommittee of CRIV, including non-CRIV members

### **Timeline**

- Assignment of task by August 31, 2011
- Completion of project by July 2012.

### **Evaluation**

- Availability of suggested terms and elements
- Acknowledged use of them in license agreements
- Evidence of modifications in vendor invoices

## **Part II – Continuation of Current Work**

### **Goal II-A. Clarify the roles of the Vendor Liaison, CRIV and other entities involved in vendor relations.**

#### **Flows from these Shared Principles:**

- We recognize the importance of collaboration as the most effective and respectful way to share information; such collaboration can result in mutually beneficial high quality products and services.
- We accept that librarians and vendors are partners, not competitors, who are committed to the long-term success of each other and the justice system.

#### **Objective**

Clarify to AALL membership the responsibilities of the multiple AALL entities that address matters related to legal information publishing, including the Vendor Liaison, CRIV, the Government Relations Committee and office, the Price Index Committee, and the Vendor Colloquium (if continued).

#### **Recommended Tasks**

- Work jointly to develop a description of all AALL entities that have interactions with vendors to define the responsibilities of each group as well as their points of intersection. Describe how these groups will coordinate activities where there may be overlap.
- On an ongoing basis, each entity should continue efforts to clarify and publicize its responsibilities.
- Develop an AALL Vendor Relations policy related to antitrust law, seeking outside counsel as needed.

#### **Responsibility**

- A task force to include representative Vendor Colloquium members, the AALL Executive Board, the Vendor Liaison, CRIV, Government Relations, the Price Index Committee, and AALL's Executive Director
- Vendor Relations Policy related to antitrust law: Vendor Liaison and AALL Executive Board

#### **Timeline**

By August 31, 2011 the AALL Executive Board will establish a timeline and name the task force members.

#### **Evaluation**

Dissemination of reports on both matters to the AALL Executive Board and AALL membership by a date to be determined by the Executive Board

## **Goal II-B. Improve vendor relations communications.**

### **Flows from these Shared Principles:**

- We have a commitment to constructive and civil communication based upon mutual respect, trust, and a recognition of the value each brings to the table.
- We strive to maintain clear and transparent communication while understanding that we are each managing a business and owe duties of loyalty to our employers.
- We accept that librarians and vendors are partners not competitors who are committed to the long term success of each other and the justice system.
- We recognize that it is in our collective interest for vendors to promote librarians' continuing and developing professional roles.
- We recognize the value of training librarians and end users so each is proficient in the use of a product.
- We recognize the importance of collaboration as the most effective and respectful way to share information; such collaboration can result in mutually beneficial high quality products and services.
- We mutually commit to efficient business procedures and systems.

### **Objective**

Clearer, quicker responses by CRIV and vendors to concerns from librarians

### **Recommended Tasks**

- CRIV will continue to encourage AALL members to share best practices via CRIV Tools, *CRIV Sheet*, and LISvendor.info.
- CRIV and the Vendor Liaison will update the CRIV website and will communicate consistently and in a timely manner.
- Vendors will acknowledge concerns and will respond in a timely manner to CRIV's requests for information and resolution about their own publications.
- CRIV will post responses to issues consistently to a set list of discussion lists.
- CRIV and the Vendor Liaison will identify and respond to gaps in information sharing between vendors, librarians, and stakeholders, and will propose specific improvements by June 30, 2012.

**Responsibility:** CRIV, the Vendor Liaison, and vendors

### **Timeline**

Assignment by August 31, 2011; completion by June 30, 2012

### **Evaluation**

- Evidence of regular posting to the various means of communications by CRIV, the Vendor Liaison, AALL members, and vendors
- Proposals regarding additional steps to improve communication

**Goal II-C. Create formal and informal means for vendors, librarians, and stakeholders to have the opportunity and platform to engage in dialogue about the future of legal information publishing and vendor-librarian relations.**

**Flows from these Shared Principles:**

- We each are committed to providing library users the highest quality research tools and information content, even in times of social and economic transformation.
- We have a commitment to constructive and civil communication based upon mutual respect, trust, and a recognition of the value each brings to the table.
- We recognize that it is in our collective interest for vendors to promote librarians' continuing and developing professional roles.

**Objectives**

- Identify and promote existing vehicles of communication.
- Strengthen CRIV's communication with AALL members.
- Invite smaller legal information publishers into dialogue.
- Keep members apprised of policy-level developments.
- Develop a forum for annual deliberation on vendor relations and consumer advocacy.

**Recommended Tasks**

- By August 31, 2011, assign an *ad hoc* subcommittee of CRIV to work with the Vendor Liaison to inventory and evaluate communications mechanisms and to make recommendations regarding their development and promotion, recommendations to be made by October 31, 2011.
- By August 31, 2011, the Vendor Liaison will contact legal information vendors not invited to the Vendor Colloquium, invite them to read the summary, and to engage in dialogue going forward.
- On an ongoing basis, communicate with AALL membership regularly about policy matters involving information vendor relations.
- Explore potential new forums for direct communication between librarians and vendors.
- Assign the Vendor Liaison and CRIV responsibility for an annual vendor relations and consumer advocacy program at the AALL annual meeting.

**Responsibility:** CRIV, Vendor Liaison

**Timeline:** Varies, see above.

**Evaluation**

- Evidence of regular, coordinated messages to membership by CRIV and the Vendor Liaison
- Periodic policy discussions in AALL Spectrum and through Vendor Liaison communications
- Increased participation by vendors in the Vendor Roundtable at AALL

### **Part III – Other Issues to be Developed for Future Consideration**

Collaborate with vendors on effective training programs

Address issues related to the open access movement

Establish a format and rotation for future colloquia