APPENDIX 1

Full Report of the AALL Price Index Review Task Force

AALL President Joyce Manna Janto set up the AALL Price Index Review Task Force “To review the AALL Price Index for Legal Publications, and to recommend to the Executive Board any necessary changes regarding the Index.” The charge to the Task Force was to “… investigate all aspects of the AALL Price Index for Legal Publications. This review shall include, but not be limited to:

- Investigating if the need for the Price Index still exists and is a value to AALL members
- If the Price Index is of value to members, should it be produced differently
- How could the work of the committee be more equitably distributed
- If AALL should partner with another organization or individual to produce the Price Index. “

Task Force members are: Judy C. Janes (University of California at Davis), Mary Lu Linnane (De Paul), Diana Jacque (University of Southern California), Phyllis Marion (California Western School of Law), Merle Slyhoff, Chair (University of Pennsylvania), and Margaret Maes, Ex Officio (AALL Vendor Liaison).

BACKGROUND:

The current Price Index is compiled by members of the Price Index for Legal Publications Committee. Publishers are asked to provide the supplementation prices for their publication, Committee members input the data, and AALL staff (part-time employee hired for this specific task) inputs the data into a workable spreadsheet. The Committee chair takes the data, investigates any discrepancies or questionable pricing, and works to create the content of the Price Index.

Over the years questions have come up regarding the Price Index, such as its continued relevance to the membership, the method of compiling the information, and the Committee members’ role in the process. The members spend their time gathering and compiling price information and do not have time to look at the “big picture,” such as what new publication formats should be included, are there new publishers/publications that should be included, or are all current publication categories still relevant.

The Task Force, realizing the importance of member input, created a short survey that went to the membership in mid-April. In addition to the survey and member comments, the Task Force solicited information from past-Price Index chairs Betty Roeske and Carolyn Dean. (See Appendix for survey and summary of results.)

RECOMMENDATIONS:

1. As is evidenced by the survey results, the Price Index is viewed as a valuable product of the Association, and should continue to be published.
2. An Editor/Compiler should be hired to input the pricing data and massage the data. This is envisioned as a part-time employee who works under the advice of the Committee and headquarters staff. The Task Force recommends this be someone who not only inputs the relevant data but also works with the pricing data to provide the necessary calculations and reports.

3. The Price Index Committee should function as a policy committee. In this capacity the Committee would work with the Editor/Compiler to assure a timely and accurate publication; advise the Editor/Compiler of what statistics are needed from the data; investigate and resolve pricing discrepancies or other inconsistencies; determine new titles and new formats/categories to be included in/eliminated from the Price Index; create procedural manuals to institutionalize the production and methodology of the Price Index; and other relevant advisory tasks.

4. Publishers should continue to be asked to provide the prices for all title supplementation.

5. The price Index should become a combination of actual prices and percentage increases. The Committee would determine which categories require prices and which require percentage increases/decreases. The titles warranting percentages are those in categories that are being cancelled or are affected by special arrangements with the publishers (such as West’s LMA), therefore making individual prices less relevant. (Discussion among the Task Force members suggested reporters, Shepards titles, digests, and academic journals as possible categories warranting percentages rather than individual costs.)

Publishers would continue to be asked to provide the prices for all title supplementation and the Editor/Compiler would calculate the prices into percentage increase/decrease. In some cases, such as academic journals, percentage increases may be available from a vendor such as Hein and eliminate the need to gather individual prices for each journal.

6. The Price Index for Legal Publications Committee would work with AALL staff and the Editor/Compiler to assure a smooth transition to these new procedures and a new Price Index, including the creation of new templates that would be sent to the publishers for input of prices, and timetables that would assure timely publication of the Price Index.

7. The Price Index should continue to be compiled and produced solely by the AALL membership and staff. It was viewed that any involvement or contribution by a publisher to the actual production of the Price Index would lead to questions about the transparency, fairness and unbiased nature of the Price Index. The Editor/Compiler, while an “outsider,” would be unbiased as this person would not come from the publishing field, and would be advised throughout the process by the AALL Price Index for Legal Publications Committee and AALL staff.
APPENDIX 2

Survey Questions

AALL Price Index Survey

Questions marked with an asterisk (*) are mandatory.

Please rate the importance of having the following categories of materials within the Price Index. (1 Very Unimportant; 2 Somewhat Unimportant; 3 Neutral; 4 Somewhat Important; 5 Very Important)

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Supplemented treatises
Electronic format

* How often do you consult the AALL Price Index?
Select one choice

2
Frequently (more than 4 times per year)
Occasionally (2-3 times per year)
Rarely (1 time per year)
Never, please indicate why

If you consult the Price Index, please rate your primary and secondary use

1 2

Track price changes in individual titles via the query function
Additional Comment

3

Track overall percentage increases as set out in the Appendices
Additional Comment

Would you use/continue to use the Price Index if it only tracked overall percentages and did not include prices for individual titles?

4 Not sure, please explain
* How important is it for AALL to continue producing the Price Index? Select one choice

Very Important
Somewhat Important
Neutral
Somewhat Unimportant
Very Unimportant

* Please indicate type of law library

Court Library
Law Firm Library
Law School Library
Other, please specify

Comments and suggestions

May we contact you if we have additional questions? If so, please provide your name and email information. (optional)
APPENDIX 3

AALL Price Index Survey: Results Summary

371 individuals completed the April 2011 Price Index Task Force survey. Demographic information on the survey respondents is found in question 6.

Question 1. How often do you consult the AALL Price Index?

When asked how often they consult the AALL Price Index (PI), 75% of respondents used the Price Index one or more times per year. 42% used the PI twice or more per year. 26% of respondents stated that they never use the PI. The most common reasons why are: PI is missing Thomson Reuters supplementation data; respondent is not aware of PI, unsure what PI is, or does not remember to use PI; respondent does not find the information within PI to be useful or of value; respondent uses similar information found within the Svengalis; respondent uses their internal statistics; and respondent is unable to use PI due to timing issues related to the PI being published after their own budgeting cycle.

Question 2. If you consult the Price Index, please rate your primary (1) and secondary (2) use

189 respondents stated that their primary use of PI is to track overall percentage increases as set out in the Appendices. 88 respondents stated that their primary use of PI is to track price changes in individual titles via the query function.

Question 3. Please rate the importance of having the following categories of materials within the Price Index: Serials (including periodicals), serials (excluding periodicals), periodicals (all), periodicals (academic), periodicals (commercial), reporters, citators, digests, codes, legal encyclopedias, looseleaf services, newsletters, supplemented treatises, and electronic format

For the vast majority of material types, more than 60% of respondents rated it somewhat important or very important to have the following material categories within PI: 69% serials (including periodicals); 73% serials (excluding periodicals); 66% periodicals (all); 69% periodicals (commercial); 69% codes; 61% legal encyclopedias; 81% looseleafs; 61% newsletters; 78% supplemented treatises; and 78% electronic format.
Other material types were rated by members as being less than 60% somewhat important or very important that they are within PI. This data reveals trends in library print collections. Only 43% state that having periodicals (academic) within PI is somewhat important or very important; also, 26% of respondents were neutral on the inclusion of this type of material. 55% of respondents rated the inclusion of reporters in PI as somewhat important or very important. Of note, 20% of respondents rated the inclusion of reporters in PI as very unimportant. 51% of respondents rated digests as somewhat important or very important while 17% rated digests as very unimportant.

Citors were rated by 34% of respondents to be somewhat important or very important. 41% of respondents listed the inclusion of citators as somewhat unimportant or very unimportant.

**Question 4. Would you use/continue to use the Price Index if it only tracked overall percentage increases/decreases and did not include price for individual titles?**

When asked if they would use/continue to use the PI if it only tracked overall percentage increases/decreases and did not include prices for individual titles, 34% of respondents stated that they would not use the PI if it only tracked percentages of overall increases/decreases.

Those commenting on this question were decidedly lukewarm about a Price Index that did not contain pricing information for individual titles. Many members indicate that even though they would continue to use the PI if it did not have this information, they would find it to be much less useful. The comments indicated a strong preference for retaining the individual pricing in order to facilitate budgeting.

**Question 5. How important is it for AALL to continue producing the Price Index?**

Most respondents consider it important that AALL continue to produce the Price Index. 58% consider it very important and 23% consider it somewhat important. Only 3% consider it
very unimportant and another 3% consider it somewhat unimportant. 12% are neutral on the importance.

**Question 6. Please indicate type of law library.**

A majority (54%) of those responding indicated they were from law firm libraries. 25% of the respondents were from law school libraries. 10% were from court libraries. 11% indicated they were from other libraries. (By far, those who indicated they were from “Other” types of libraries were from county and other governmental libraries.)

**Question 7. Comments and suggestions.**

Seventy-nine (79) comments were received on the surveys. Two additional comments were received by separate e-mails. There were six themes receiving multiple comments. The themes are listed below in descending order of the number of comments received on the theme.

1. The PI is critical to the library’s budgeting process or to explain costs to administrators.
2. If the PI is to continue to be important, it must include all the major vendors (the West issue).
3. The PI is critical because it increases pricing transparency and lets publishers know that someone is watching them and reporting the pricing information.
4. There is a lack of knowledge about the PI that should be addressed by more publicity.
5. The PI is a membership perk/association responsibility that needs to be continued.
6. The PI needs to have a professional editor as it did in the beginning.
7. The PI is no longer needed, usually accompanied by mention of the Svengalis book.

Diana C. Jaque

Phyllis C. Marion

5/12/11