The CRIV Sheet

The Newsletter of the Committee on Relations with Information Vendors AALL Volume 38, No. 1 November 2015

Contents

Alexa Robertson Practising Law Institute

Editor's Corner

It is my pleasure to begin serving as the editor of *The CRIV Sheet*. First, I would like to thank Sara Paul Raffel for her leadership, guidance, and hard work as outgoing editor. I learned so much serving as her assistant editor and plan to continue her work to ensure this publication covers the timely and informative, as well as interesting, vendor relations-themed topics that will be of use to the members of AALL. I am pleased to begin working with C.J. Pipins, Glida Chiu, and Valerie Carullo this year on *The CRIV Sheet*. For this issue, we've continued the tradition of an AALL Annual Meeting & Conference wrap-up issue. We have several summaries of programs. If you missed the meeting or were not able to attend a program due to scheduling conflicts or just want a quick refresher, you will find these recaps to be valuable.

We have two items to announce as we kick off the 2015-2016 year:

- This year *The CRIV Sheet* is "going green" as we transition from print/electronic delivery to electronic only. This publication will be emailed to AALL members, and older versions will continue to be archived.
- We anticipate new content being added to *The CRIV Sheet*—in addition to the articles written by AALL members, we will report anything new and noteworthy from the bi-annual CRIV calls with legal publishers.

If you would like to contribute to *The CRIV Sheet* or just share your ideas on improving vendor relations, please contact us. Your comments, letters, suggestions, and submissions are always appreciated. We love to hear from librarians in a variety of settings. Please email any member of *The CRIV Sheet* subcommittee with suggestions for articles: Alexa Robertson, Valerie Carullo, CJ Pipins, or Gilda Chiu. View our editorial policies.

Jacob Sayward Fordham Law School

From the Chair

Welcome to the first issue of *The CRIV Sheet* for 2015-2016. It's a big year of change for CRIV. We are not only embracing a new format for *The CRIV Sheet*, but we are also taking on a number of new responsibilities while shedding some old ones. I hope all of you will be reading *The CRIV Sheet* and following the CRIV Blog this year, as well as periodically checking in with our CRIV Tools and other publications. We are a committee that works year-round to assist AALL members, so I invite you to wring every ounce of value out of us that you can. That includes submitting a Request for Assistance when you cannot resolve a vendor relations issue. You should also feel free to email me questions or feedback you have about CRIV's work, ideas for *The CRIV Sheet* articles, and suggestions for CRIV programming at the AALL Annual Meeting.

CRIV will also be taking over some of the former responsibilities of AALL's vendor liaison this year. These will include regular communication with key legal information vendors and the filing of reports to apprise the AALL Executive Board of new vendor developments.

In the meantime, please enjoy this issue of *The CRIV Sheet*. It features lots of great coverage of vendor relations programming at this summer's AALL Annual Meeting written by our CRIV members.

Finally, I'd like to extend some thanks. Liz Reppe did a great job chairing CRIV this past year, which made it an especially easy transition for me and the rest of the committee. AALL's former vendor liaison, Margie Maes, has also been an enormous help to CRIV for years. And the current members of CRIV have already shown what a talented and motivated committee can do, from an editorial staff embracing a new publication format to the brand new members already helping out with proposed programs. I thank you all.

AALL 2015 in Philadelphia: Annual Meeting Educational Program Summaries

The CRIV Roundtable

Valerie Carullo
Bloomberg BNA

Rebecca A. Rich
Nova Southeastern University College of Law

At the 2015 AALL Annual Meeting & Conference in Philadelphia, incoming CRIV Chair Jacob Sayward led an enthusiastic, engaged group of about 40 vendor representatives and law librarians in a discussion about new trends and desired changes in vendor relations and operations on July 19. Participants included field and corporate representatives from all major legal information vendors (William S. Hein & Co., Inc., Wolters Kluwer, LexisNexis, Bloomberg BNA, Practising Law Institute (PLI), Thomson Reuters, Fastcase, and West Academic) and some of the smaller ones (Cassidy Cataloguing, for example) as well as academic, law firm, and government librarians.

Feedback for Vendors

Several vendors gave examples of how librarian feedback has changed the way they market to and train librarians. One example given is reducing the frequency of mass mailings and providing an opt-in rather than opt-out model. All of the vendors declared an increased emphasis on making sure that the content of mailings was relevant to the audience so that the emails were read rather than summarily deleted. Most vendors had stopped or greatly reduced paper mailings in response to feedback.

Mike Bernier from Bloomberg BNA said that his company had gone to one email a month to everyone and then an opt-in email for new developments. Bloomberg has also started to provide a Word document that librarians can cut and paste from to keep patrons informed, in response to feedback from reps and librarians. Lori Hedstrom, library relations national manager, Thomson Reuters, noted that the new trends are opting out of communication, and librarians as well as lawyers seemed to be more responsive to the ability to opt in to customizable content that interests them.

Several vendors mentioned that they take feedback given via the "feedback" button on their website very seriously. Joe Breda from Bloomberg BNA explained that their telephone help desk employees are in the same building as their training staff and this allows for a lot of extra training in new and upcoming features as well as cross-feedback on what is most frustrating to users. Gayle Lynn-Nelson of LexisNexis said that feedback from their "feedback" button goes directly to product managers and executives and that many changes to LexisNexis came straight from feedback given there. Hedstrom said that Thomson Reuters uses similar methods to the above—an aggregation of feedback from reference attorneys and feedback given in WestlawNext—to make changes. Michelle Best, director of sales and account management for law schools at Thomson Reuters, said that she regularly reads these reports and knows that other executives do as well. Several vendors also said that it is worth going to the library relations staff if traditional routes for feedback aren't working. Hedstrom said that "I am a librarian" is a good phrase to start with to get feedback taken extra seriously.

Some examples of feedback that have made a difference include adding MARC records to the services provided. Alexa Robertson from PLI, and also a CRIV member, mentioned that they had started to include the records after frequent feedback that they were desired. Hedstrom said that as they sunset Westlaw Classic, they had started to edit their available MARC records, and they valued feedback from librarians on what new records are needed and what records no longer worked. Also, the detail level required for good LOC subject headings, particularly from Harvard, has been very useful.

Feedback for Librarians

Sayward asked which part of librarian feedback had been most useful to the vendors and what feedback they had for librarians. A common theme among the responses was that feedback made at the AALL Annual Meeting & Conference was useful and so was feedback throughout the year. Several vendors commented that they wanted as much feedback as possible and took the feedback given over all of the available channels very seriously.

Linda Dunton from Wolters Kluwer and Bernier from Bloomberg BNA both commented that they had gone to a monthly newsletter for librarians after noticing that librarians don't always have the time to see what's new in their products. Wolters Kluwer also has an advisory board that gives good feedback.

When asked to identify the best method to reach a vendor with an issue, most of the vendors agreed that the account representatives are a good starting point. Social media was also mentioned as a good tool because Twitter and Facebook allow librarians to reach people higher up in the companies to whom they might not otherwise have access. This mode of contact can sometimes reduce bureaucratic barriers to problem solving. Breda reiterated that social media can collapse the communications layers in problem cases where other measures have been tried first.

Training

The new trend, according to several vendors, is just-in-time training via short videos, particularly for students and practitioners. Customized training via appointment, whether in person or via individualized webinars, have also become popular. Some vendors have reduced in-person trainings and/or the availability of the reps in favor of these videos. Hedstrom mentioned that they had found that librarians still preferred "deeper dives," so they still offer that sort of training for librarians. Lynn-Nelson said that "train the trainer" training and short videos seemed to be what was in demand.

Diane Jaque, head of collection development and acquisitions at the University of Southern California and a member of CRIV, noted that her school found these short videos very useful for LLM and 1L training and that they were appreciative of the content.

Caroline Walters, collection development librarian at Harvard, said that they weren't using the videos but were asking for vendor materials for ad hoc training, such as their "speed dating"-style clinical showcase.

Sayward mentioned that, while videos are great, they aren't customizable, and it is often hard to get the "perfect" video for your audience, so videos shouldn't take the place of in-person training. A couple of librarians mentioned that they had seen a reduction in representative availability and appreciated the videos.

Lynn-Nelson said that the student base is changing and seems to prefer the short videos and webinars to in-person interactions. Because of this, the training that LexisNexis offers to students and practitioners is very different than the training they offer to librarians, which is done specifically for and by librarians.

James Gernert, an incoming CRIV member and law librarian for the Social Security Administration, pointed out that one overlooked problem with the videos taking the place of in-person training was that some government librarians require special permission to watch streaming videos. Hedstrom said that for government attorneys, LexisNexis will use Blackboard, GotoMeeting, or telephone trainers in lieu of videos. Kathleen Noreau from Bloomberg BNA mentioned that librarians can also use the 24-hour help line to get just-in-time training.

Requests for the Future

Several librarians mentioned that they really want good usage statistics to help sell the value of the databases to stakeholders, particularly COUNTER-compliant statistics. Vendors said that, while they offered some usage statistics, legal information vendors are consistently behind on COUNTER compliance. Shannon Hein of William S. Hein, Inc. said that the new discovery systems also complicate the process of providing useful statistics.

Liz Reppe, outgoing CRIV chair and state law librarian for the Minnesota State Library, stated that quality reps and training for reps was a crucial issue for good vendor relations.

In response to a question from Sayward on what librarians could do to best help with vendor relations, the answer was uniformly "communication." Dick Spinelli from Hein said that being specific and communicating the problem as soon as possible was helpful.

Work Smarter, Not Harder . . . More Hip Tips for the Acquisitions Librarian

Jeanne Frazier Price
University of Nevada, Las Vegas

Speakers: Ajaye Bloomstone (Louisiana State University), **Rachel Decker** (Chapman University Law Library), **Alan Keely** (Wake Forest University), and **Jean Willis** (Sacramento County Public Law Library)

Recognizing that the acquisitions librarian's responsibilities are likely to range far beyond the traditional function of buying books, the Work Smarter, Not Harder program at the 2015 AALL Annual Meeting & Conference focused on policies and tools that increase efficiency and accountability and promote positive staff morale. The program built upon the speakers' experience and belief in the power of collaboration and incorporated audience feedback on all of the topics. The program was divided into three parts: a discussion of traditional acquisitions functions ("Choosing and Getting the Stuff to the Door"); an overview of staff and time management ("Management of People and Time"); and a presentation on data and records management and planning for the future ("Managing the Stuff"). If there was a theme to the program, it was the emphasis on putting technology to good use and empowering staff.

Choosing and Getting Stuff to the Door

The speakers suggested that the acquisition librarian's job depends on reliable avenues of communication between vendors and librarians. While the actual mechanics of ordering and claiming may be fairly routine, tasks such as keeping track of changing publication schedules, assessing and comparing usage statistics among competing platforms, and complying with institutional purchasing procedures have become more complex as subscription models and formats change. Speakers insisted that acquisitions librarians should be well-prepared in their conversations with vendors. Knowing competing products and their costs, understanding (and being able to articulate) a product's value to one's own institution, and being aware of the availability of bibliographic records for online products are all important pieces of information, not only in negotiating with vendors but also in justifying the use of funds to support particular purchases.

The idea of using technology to support decision-making was implicit through the program. Setting up tickler systems in the integrated library system (ILS) to alert staff of upcoming renewals, using statistics to identify trends in usage, automatically generating emails to remind staff to assess potential products, and setting up annual schedules to review and evaluate subscription lists were all techniques suggested by panelists and the audience. The trend toward vendor-supplied bibliographic records was commented on (and applauded). This section of the program also included tips for dealing with foreign publishers—speakers thought it was more efficient to arrange for billing in U.S. currency and suggested that wire transfers, if allowed in your institution, may offer some safety in transferring funds overseas.

But for all that technology can do, the soft skills—knowing how to negotiate and educate vendors, maintaining an ongoing relationship with vendors (no matter how frequently the individual representatives may change), and being able to articulate your concerns—are, as panelists and audience members alike emphasized, irreplaceable. All agreed that cultivating those skills among staff and giving staff members opportunities to exercise those skills may go a long way toward establishing more efficient acquisitions processes and relationships.

Managing People and Time

Diversifying departmental functions and shuffling responsibilities among staff seemed to be the theme of this part of the program. While no one denied that acquisitions staff is likely to take on more duties as technical services staff sizes decrease, speakers and audience members saw this trend as an opportunity to engage staff, expand staff members' skill sets, and add value to traditional acquisitions tasks. They noted the importance of cross-training and the benefits of it to those who do the training (who doesn't like to talk about what they do and share with others how they do it?) and those who are trained (the more skills someone has, the more valuable an asset he or she is to the organization).

Technology plays a role here as well. Setting up safeguards in the ILS that prevent or at least catch anomalies can help ensure better records from the onset and capitalizes on the value invested in the ILS.

But in any context where staff members are asked to take on additional responsibilities, transparency in decision-making is key. And with transparency comes from a continued focus on communication. Panelists repeatedly emphasized the need for written procedures, regular meetings, and detailed documentation. Ensuring that all staff understands workflows and individual responsibilities helps everyone deal with issues as they arise. Giving staff members a say in their own job descriptions can add value and increase morale. One suggestion was to create a bulletin board with post-it notes describing particular tasks. Individual staff members could "claim" tasks for which they were well-suited, which might lead to switching of tasks among staff, as assignments dreaded by one individual might be more desirable to someone else. Another suggestion was for acquisitions staff to become more involved in collection development as they have valuable information about usage, cost, and customer service that may impact collection-development decisions.

Managing the Stuff

The last portion of the program turned to document and information management. Acknowledging that public and private institutions are focusing on accountability and data-driven decision-making, the speakers proposed ways of capitalizing on technology to track acquisition activities, manage workflows, generate reports, and preserve information and data for future decision-making. Pivot tables in Excel spreadsheets—how to create them and the purposes they might serve—were highlighted by Alan Keely. He discussed how pivot tables enable staff to manage and explore large of amounts of data, whether it comes from acquisition invoices, database usage reports, university accounts payable records, furniture purchase invoices, or any other records, and to study that data from any number of different perspectives. A single Excel spreadsheet can generate a variety of filtered and ordered reports that can be saved and updated or created "on the fly" to answer questions as they come up.

Speakers stressed the importance of record keeping (e.g., suggesting that print copies of invoices be kept for two years) to not only justify past spending but support future acquisitions. Panelists also emphasized the importance of keeping a close eye on spending levels throughout the year so as to avoid surprises at year-end. On those occasions where year-end money unexpectedly becomes available, having a wish list of significant new acquisitions may help focus the decision-making process. The panelists and audience agreed that an ongoing review of processes and workflows and the corresponding updating of procedures go a long way toward making everyone more efficient.

Speakers prepared and distributed a helpful handout that included lists of (1) professional organizations that support networking among technical services librarians (AALL Technical Services SIS; AALL regional chapters; ALA Association for Library Collections and Technical Services [ALCTS]; SLA Technical Services Section); state library associations; (2) tools and reference resources for technical services tasks (XE Currency Converter; CRIV Tools; ALCTS Acquisition Resources; AcqNet-L: The Acquisitions Librarians Electronic Network; Law Library Conversations Podcasts; *The CRIV Sheet*; Svengalis' *Legal Information Buyer's Guide*; Karen Schmidt's *Understanding the Business of Library Acquisitions*; Mary Beth Weber's *Rethinking Library Technical Services: Redefining Our Profession for the Future*); and (3) conferences and training opportunities for acquisitions librarians and staff (Charleston Library Conference; Acquisitions Institute; InfoPeople [CA only]; ALCTS' *Fundamentals of Library Acquisitions*).

Strategic Integration of E-books and Digital Content in Law Libraries

Liz Reppe
Minnesota State Law Library

Speakers: Sandra B. Placzek (University of Nebraska – Lincoln) and **Bess Reynolds** (Debevoise and Plimpton)

This program at the 2015 AALL Annual Meeting & Conference included a firm librarian and an academic law librarian, each of whom had unique insight on the topic of implementing e-books.

The first speaker was Sandra Placzek, associate director and professor of law at the University of Nebraska–Lincoln. She spoke about her library's experience with an e-book project done with the Mid-America Law Library Consortium (MALLCO). Her library and 13 others tested an e-book program through EBL Proquest. The group started with an online discussion to determine the parameters of the project. They wanted to limit the types of materials made available to patrons. They did this by setting LC ranges, copyright dates, and languages to be included in the e-book titles. They also decided how many short-term loans would be required before an e-book would be purchased by the library. Each library was able to set a price cap so that an e-book would not be automatically purchased if it was over a certain amount. The University of Nebraska set its cost limit at $1 so that every book would have to be approved by the library before it was purchased.

Placzek reported that even though during the 18 months of the program the e-books got very little use, her library decided to continue offering them. She reasoned that the lack of use was due to the difficulty patrons had in finding them.

She later surveyed MALLCO libraries on their e-book use. She received responses from 14 of the 27 libraries. Most libraries were using EBL Proquest and made the e-books available through the OPAC. When asked how the e-books were marketed, most libraries reported they were linked in the OPAC. Others also used emails, the library's webpage, word of mouth, and reference interactions. Half of the libraries limited their e-book access to law students and faculty, and the rest allowed campus-wide access. Only one library was loaning devices, but most reported providing some basic tech assistance, such as how to access or download. Placzek encouraged libraries to partner to share the cost—either with the other libraries on campus or with other institutions. Her library set aside $2,500 for the MALLCO test.

She reviewed several things to consider before purchasing e-books. First, libraries need to match the e-book content to their collection-development policy. She pointed out that e-books might be more attractive to schools offering distance education. She stressed that the e-books have to be discoverable and mentioned several options for doing this including email, newsletters, brown bags, LibGuides, training for students and faculty, reference, and handouts.

Placzek pointed out the importance of communicating the value of the product and talked about how to show what you are getting for the money. E-books allow for much better tracking than print books. The platforms offer usage statistics to determine the number of times the book was used and whether multiple users accessed it. In addition, the demand-driven acquisition model allows libraries to know what patrons are accessing; not just specific items, but also topical areas.

She ended her portion of the program by listing several benefits of e-books: with e-books, you always have the most recent edition; libraries save staff time on weeding and processing print materials; and e-books don't go missing and can be checked out when the library is closed.

The second speaker was Bess Reynolds, electronic resources manager at Debevoise and Plimpton. She started by pointing out that e-resources can be invisible to users unless the library does a good job of making people aware of them. She also warned against "siloing" e-books by publishers. Attorneys might know an author or title but will not typically be familiar with the publisher of a book.

Reynolds' firm uses e-books from LexisNexis and the New York Law Institute (NYLI). The e-books they get from Lexis mirror their print subscriptions. They have access to more than 70,000 publications from NYLI. Reynolds asks the vendors she works with to integrate e-books with the library's OPAC so books can be searched and checked out from the catalog. She has OCLC MARC records for the Lexis e-book titles.

Reynolds stated that the attorneys can access the e-books from anywhere but do need to use credentials. She also said that it has to be easy to access the e-book the first time or the attorneys will not go back.

Reynolds conducted a survey of 74 firms regarding their use of e-books. Fifty-four percent indicated they had e-books and 44 percent said they plan to purchase in the coming year. She wasn't sure if this meant fewer people were adopting or if they were not planning to purchase more because they already had the titles they wanted.

She spoke briefly about Lexis and indicated Lexis had gone with an existing and well-known platform—Overdrive. She said users of the Lexis Digital Library can also purchase e-book titles from ABA and West Academic. She recounted that she had seen a quick presentation on the new Thomson Reuters Proview product and said that it looked like they had reduced the number of steps required to access their e-books.

Reynolds then discussed some of the barriers libraries face in implementing e-books. First, there might be a lack of attorney demand. Second, costs are a factor—both for the content, which is often duplicative, and for the platform fee. She also pointed out that e-books can be difficult to manage as different vendors often use different platforms.

She ended her presentation by pointing out that the prediction that adding e-content would be cheaper and require less staff is incorrect. As libraries move toward electronic resources, they might need fewer paraprofessionals; instead they need professionals with advanced skills.

Overall, I found the program to be useful. We are at the beginning stages of adding e-books to our collection. Even though I work in a government library, the content presented was fairly universally applicable.