Strategies for Strengthening Collective Dealings

eDesiderata Forum 2019
Welcome and Introduction

Greg Eow
President

Center for Research Libraries
Strategies for Strengthening Collective Dealings

James Simon
Vice President for Collections and Services

Center for Research Libraries
eDesiderata is an interactive space for sharing information and opinions about e-resources of interest to CRL libraries, and for tracking the status of e-resources under consideration or negotiated by CRL for member purchase and licensing... read more.

<table>
<thead>
<tr>
<th>Total Resources (A-Z)</th>
<th>New &amp; Modified (30 days)</th>
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<td>541</td>
<td>57</td>
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### CRL Reviews
196 Resources analyzed by CRL (by date of posting)
- Social Explorer - Direct
- Wiley Digital Archives
- VoxGov Federal
- South Asia Terrorism Portal
- Planet
- Yemen Data Project

### Active Offers
87 Resources with active CRL offers (by date of expiration)
- OpenEdition Freemium For Journals expires in 2 days
- Érudit expires in 3 days
- Le Grand Robert expires in 4 days
- ORCID expires in 17 days
- DigiZeitschriften

### CRL Pipeline
23 Resources under consideration (by date of posting)
- Wiley Digital Archives
- The Business & Management Collection
- VoxGov Federal
- RetroNews
- Oxford University Studies in the Enlightenment Online
Washington Post Online

CRL Status: Active Offer, Reviewed by CRL

Feedback:
7 User comments 2.3 Average Rating 4 thumbs

Overview


Provider WP Company LLC (The Washington Post)

Posted Dec 14, 2015 4:42pm

Updated Oct 23, 2019 9:11am

Source

CRL reviews are based on independent research. Information is researched by CRL staff and other specialists at CRL libraries. See CRL Review for additional source notes.

Community Ratings

Platform and user interface

Your rating: None Average: 3 (1 vote)

Content scope and completeness

Your rating: None Average: 3 (1 vote)

Cost and price-structure

Included in the package

Interested in this Resource?

I recommend that CRL prioritize this resource for evaluation and possible pricing negotiations.

Watch this Resource

By watching this resource you can monitor its activity in meDesiderata.
eDesiderata Forum 2016 – Licensing “Big Data”

Described challenges of providing access to databases and major datasets in three areas:

• Business and Financial Data
• Public Opinion and Population Data
• Geospatial Data

Explored community interest, identify priorities for CRL and NERL licensing

https://www.crl.edu/events/licensing-big-data-edesiderata-forum
eDesiderata Forum 2017 – Investing in Persistence of News

Examined production, dissemination and use of news in today’s digital environment

Explored strategies and models for library investment in news access:

• Site licensing of major online news sources
• Direct library investment in news access and preservation

https://www.crl.edu/events/investing-persistence-news-edesiderata-forum
eDesiderata Forum 2018 – Supporting Open Primary Sources

Examined existing and emerging models for sustaining Open Access digital resources through:

• Community-owned infrastructure
• Grassroots efforts and membership models

Explored strategies and methodologies to sustain Open Access resources through collective action and cooperative investment

https://www.crl.edu/events/investing-open-primary-sources-edesiderata-forum
Strategies for Strengthening Collective Dealings

Forum Agenda

**CRKN's Member Engagement and Strategic Planning**
12:15-12:45 p.m. CT

**Jisc's Group Purchasing for UK Libraries**
12:45-1:15 p.m. CT

**NERL's Negotiation Committee Outcomes**
1:15-1:45 p.m. CT

**ABLD & AALL: Member Advocacy and Vendor Relations**
1:45-2:15 p.m. CT

**Panel Discussion: How Can CRL and NERL Best Serve Members' Interests?**
2:15-2:45 p.m. CT

**Conclusion**
CRKN's Member Engagement and Strategic Planning

Clare Appavoo
Executive Director

Craig Olsvik
Manager of Licensing

The Canadian Research Knowledge Network
CRKN's Member Engagement and Strategic Planning

Clare Appavoo – Executive Director
Craig Olsvik – Manager, Licensing
Vision

The world’s knowledge is accessible by all.

Mission

CRKN advances interconnected, sustainable access to the world’s research and to Canada’s documentary heritage content.
CRKN At-A-Glance

- 26 Staff (four with licensing responsibilities)
- Volunteer Board
- 5 Standing Committees and 2 Task Groups
- 78 Institutional Members (75 Universities, 3 GLAM)
- 1 Associate Member
- Licensing expenditures of over $125M annually
Governance
CRKN Abridged History (1/2)

1999

- **CNSLP Launched**
  Coordinated response to CFI funding opportunity with support of 64 universities

2001

- **Introducing CRKN**
  CNSLP incorporates as NFP & is renamed as CRKN. Board of Directors is formed.

2004

- **DCI Project Launched**
  Project launched with funding from CFI, provincial, governments, & 67 universities

2005

- **STM Site-Licenses Activated**
  ED hired & committees launched to lead the licensing process

2007

- **New Program to Support HSS**
  3-phase content expansion launched to financially support digital content in HSS

2008

- **CRKN Growth**
  Membership of 75 libraries with 45 licenses & funds in excess of $100M annually. Member institutions remain committed to sustaining initiatives.
CRKN Abridged History (2/2)

CRKN Welcomes Second Executive Director
CRKN hired Clare Appavoo, the organization's second Executive Director

External Review of Negotiation Effectiveness
Review found that CRKN to be both effective and efficient while achieving excellent cost control

New Model License
Ensuring that all licensed content has rights and permissions that are as advantageous as possible for researchers and users.

2012
New Strategic Plan
CRKN introduces new strategic direction of *Collaborating to advance digital scholarship*

2013

2014
New Banding System
Developed to provide a relative measure of comparison among members and a consistent basis for setting prices

2015

2017
CRKN and Canadiana.org Merger
CRKN continues its core licensing activities while expanding support for the digitization, access and preservation of Canadian heritage content

2018
Partnerships & Collaborations to Advance Digital Scholarship

- Coalition Publi.ca & Érudit Partnership
- SCOAP³
- ORCID-CA
- National Heritage Digitization Strategy (NHDS)
- Leadership Council for Digital Research Infrastructure (LCDRI)
- NISO Membership
- COUNTER
Canadiana Platform & Digitization Services

- Canadiana collections
  - Canadiana Online
  - Héritage

- Digitization services
  - Canadiana collections
  - Member content
  - Third-party collections

- Preservation and access
  - Trustworthy Digital Repository (TDR)
  - Access platform
  - Ongoing development work
Strategic Planning Process
- Aug 2018: Hired strategic planning consultant
- Developed planning framework and process

- Board session in January
- Regional meetings from February-June 2019 to validate findings

Plan ➔ Consult ➔ Validate

- 9 consultations with members
- 2 staff sessions
- 2 surveys
- 13 one-on-one stakeholder calls
- Developed and circulated the consultation report
Access to Knowledge

1. Principle-based negotiation + licensing
   - Alternative models
   - Collections
     - Decrease visibility
     - Expanding
   - Transform access to Knowledge (OA)

2. Partnership
   - NHDS
   - LAC Erudit
   - ORC10
   - Inauguro
   - CARL
   - CRL
   - Members + new stakeholders

3. Thought leadership
   - Next opportunity
   - Plan Canada

4. Canadian way
   - "We national org"
   - Define our role
     - Where do we lead?
   - Telling our story
     - (to CAUBS)
     - Lack of clarity
       - (within Canada)
     - Storytelling
       - Marketing
       - Video
     - Regular updates to stakeholders
     - Confluence CRKU/CARL
     - LAC/NHDS
     - Communications
     - Value-added
     - History +
     - Emergence where we are going
     - Increasing engagement

5. Innovative project
   - High profile
   - Game changer
   - Use our credibility
   - 10%

6. Well-known national base
   - Get funding
   - Transform a System
   - Provocative

7. Funding opportunities
   - Sustainable $$$
   - Re-evaluate business model
   - Transformation

8. Start up costs
   - Transforming Scholarly Comms
   - Access rather than Open Access
Verify

- Mini-board meetings throughout the summer
- Reviewed strategic plan with CRKN’s committees
- Developed implementation framework

Adjust

- Revised plan throughout the summer
- Board approved final draft at September meeting
- Distributed final draft to members on October 3
In 2018, the Canadian Research Knowledge Network (CRKN) launched a comprehensive, 10-month consultation with members and stakeholders. During this consultation, we spoke with hundreds of individuals representing various institutions and perspectives. We heard calls for bold actions to meet goals, the importance of collaboration, and the need for a shared vision and coordinated approaches to transform Canada’s scholarly communication infrastructure. We are proud of the consultative process that led to what we hope is our most ambitious strategic plan yet. Most of all, we are inspired by the support, guidance, and insight from our community.

Thank you to all who supported this journey and who shared their vision for the future. We look forward to achieving these goals together.
CRKN’s 2019-2024 Strategic Goals

1. Transform Scholarly Communications
2. Develop and Foster Partnerships
3. Collaborative Advocacy

Transformation in Action: CRKN’s Strategic Project

A CRKN Approach to Open Scholarship: A Multipronged Strategy to Advancing Access to Knowledge
Licensing Program
Content Strategy Committee

- Guides CRKN’s licensing activities
- 11 individuals
  - Eight nominated from Canada’s four regional consortia to ensure geographical representation
  - One elected Chair
  - One appointed Vice-Chair
  - One Band Balance member (band 13, University of Toronto)
- Eight meetings per year; three full-day in-person meetings; five virtual
- Set objectives for license negotiations
  - Approval and oversight by Board of Directors
- Attend and participate in all vendor negotiation meetings
- Review proposals and draft counter-proposals
- Oversee engagement with members re: licensing activities
- Review and consider new licensing opportunities
Licensing Lifecycle

**Information Gathering**
- Member Surveys
- Member Teleconferences
- Data Collection and Analysis
- Consultations with other Consortia

**Negotiations**
- Board Leadership & Expertise
- CSC Input & Expertise
- Member Input
- Setting Objectives
- Proposals & Counterproposals

**Offer to Members**
- Financial Commitments
- Execute License
- Invoicing
Member Engagement

• Input Mechanisms
  • Annual Surveys on upcoming negotiations; e.g.
    • Rank the following negotiation objectives in terms of priority
    • Rank the likelihood of your institution cancelling participation in this license
    • Should CRKN pursue OA-related terms within this license?

• Teleconference meetings to set priorities

• CRKN’s Annual General Meeting / Conference
  • Report back on negotiation results to date
  • Members may need to vote or informally direct CRKN on how to proceed in specific scenarios, e.g. Taylor & Francis rolling archive in 2016
Member Engagement

• CRKN Model License

• Journal Value Analytics report
  • Provide members with customized reports for the year’s licenses up for renewal
  • Contact Jason Friedman (jfriedman@crkn.ca) for more information

• Expansion of AGM to Conference
  • Opportunity for more in-depth engagement; full-day OA workshop in 2020
Discussion and Q/A

Clare Appavoo  ed-dg@crkn.ca
Craig Olsvik    colsvik@crkn.ca
Jisc's Group Purchasing for UK Libraries

Paola Marchionni
Head of Digital Resources for Teaching, Learning, and Research

Karen Colbron
Digital Content Manager

Jisc
A little bit about Jisc…

We're a membership organisation, providing digital solutions for UK education and research.

164 HE members + FE and alternative providers (total membership 560)
Our **vision** is for the UK to be the most digitally-advanced higher education, further education and research nation in the world.

We provide UK universities and colleges with shared digital infrastructure and services, such as the superfast Janet Network.

We help the sector **save time and money** by negotiating sector-wide deals with IT vendors and commercial publishers.

We offer expert and trusted advice on digital technology for education and research, built from over 30 years’ experience.
Why we did it...

Digital archival collections group purchasing scheme

Collectively lowering the cost of acquiring digital archival collections.

Visit the Jisc Collections catalogue

For enquiries contact:
✉️ karen.colbron@jisc.ac.uk
"Annual hosting fees: enough is enough!"

Lis-e-resources@jiscmail.co.uk July 2018

"We’ve had a few instances lately where annual fees for accessing resources that we have “bought” have been ratcheted up in a way that makes journal inflation look reasonable.... unannounced 200% increase" (Aberystwyth University)

"I’m happy to see that I’m not the only person who thinks these fees are subscriptions in disguise!" (University of Wyoming Libraries)

"...paying a ‘Hosting Fee’ is practically the same as a subscription...Where you have paid into the 5 figures for a ‘one off purchase’ it would be difficult to justify cancelling..." (University of the Highlands and Islands)

"...I think the issue here is really about transparency – or lack of it. We often do not know what the fees will be, other than in the year after we purchase the ‘perpetual’ licence. Uncertainty is so difficult to deal with when our budgets are under increasing pressure...." (Open University)
Some facts and figures

Jisc survey on platform/hosting fees: 70 responses (out of 164 HEIs):

- 39% of the sample spent over £50,000 on one-off purchase costs for DACs in the last academic year, and 33% spent over £15,000 on platform/hosting fees.

- Platform/hosting fees are seen as very poor value for money and are difficult to justify due to a lack of price transparency (once collections have been purchased), inconsistencies between publishers, and limited information about how price increases are/are not linked to content updates and platform developments.

- Price transparency for all costs associated with DAC purchases is the number one priority for license agreements. Respondents want more information about what is covered by platform/hosting charges and want consideration to be given to discounts and negotiation.

- Read more on the blog: Library collections; navigating the payment for access minefield
Key drivers and challenges:

Consultation with members also highlighted:

• Insts have **limited budgets for archival collections** after journals and books subs
• Support for purchasing needed for **arts and humanities collections**, less STEM
• **Cuts to subject librarians** make it difficult to keep in touch with faculty
• Libraries are often **reactive to publishers’ offer**
• **Huge diversity of resources** insts want to buy = difficult to prioritise national agreements or purchases
• Complexity of navigating **publishers’ offer and lack of price transparency**
• Recognition of increasing importance of **digital primary sources for scholarship**
• Interest in experimenting with **new models that support collective action**
Testing new approaches

Leveraging the collective purchasing power: pilot 1

• Worked with ProQuest in particular to devise a scheme that responded to members’ stated requirements and challenges:
  • **Flexible** enough to accommodate a “pick’n’mix” selection of products
  • **No platform/hosting charges** on a yearly basis
  • **Price transparency** as prices are set from beginning
  • **Economies of scale** by leveraging collective purchasing power through discount triggers

• We then engaged 2 other publishers to test if it could work on a broader level
Founding principles of the group purchasing scheme

The scheme aims to provide price transparency to UK Higher Education members

• One-off purchase with no recurring platform/hosting fees
• No need to negotiate prices – The fees have been Jisc banded to allow all members to participate
• Automatic 20% discount on members list price
• Discounts increase the more products are collectively bought by members
• All products conform to the Jisc Model License

E.g. Publisher X has 10 product titles on offer, with discount triggers set at 20% for 1-4 products sold, 25% for 5-9 products sold; 30% for 10-15 products sold etc.;

6 HE institutions across Jisc bands purchase a total of 9 products, which can be different or repeat titles from the pool of 10 on offer;

Total discount achieved =25% off the Jisc-banded list price
Proof of concept

Pilot one – March to July 2017

• 3 publishers
  • Adam Matthew Digital
  • Brill
  • ProQuest
• 24 products on offer across the publishers

• 20 UK Higher education institutions;
• 29 product sales across the publishers;
• Achieving just over 21% off the Jisc-banded price;
• A saving of £127,000 off the list price
Proof of concept

Pilot one

Institutions by band

Sales by band
“Being part of the Jisc group purchasing pilot was a very positive experience. It was good to know that negotiations were being done on our behalf by people we trusted, for resources we were interested in buying.”

Eleanor Craig, content delivery and access librarian at the University of Sussex

Proof of concept

Pilot two – November 2017 to July 2018

• 4 publishers
  • Adam Matthew Digital
  • Brill
  • EBSCO
  • ProQuest
• 70 products on offer across the publishers

• 22 UK Higher education institutions;
• 44 product sales across the publishers;
• Achieving just over 21% off the Jisc-banded price;
• A saving of £331,000 off the list price
Proof of concept

Pilot two

Institutions by band

Sales by band
"The transparency of information received, along with the discounts achieved, enabled us to make decisions about digital archival collections with certainty about the price, ensuring we got the best value".

Neil Davies, content acquisition manager, Durham University Library

From pilot to service

Creating the group purchasing framework

• EU tender launched June 2018 / Suppliers chosen September 2018
• 4 year framework (2+1+1)
• Year 1 commenced November 2018
• 9 publishers
  • Brill
  • British Online Archives
  • DeGruyter
  • EBSCO
  • Irish Newspaper Archives
  • ProQuest
  • Public Information Online
  • Taylor & Francis
  • Wiley
Group purchasing scheme

Service year 1 – November 2018 to July 2019

- 9 publishers
  - Offering up to 20 products each
  - Ranging from 1 product to the maximum permitted
- 110 products on offer across the publishers

- 18 UK Higher education institutions;
- 32 product sales across the publishers;
- Achieving just 21% off the Jisc-banded price;
- A saving of almost £155,000 off the list price
From pilot to service

Year 1 of service

Institutions by band

Sales by band
Group purchasing framework
Challenges and opportunities - publishers

• Reviewing the framework requirements to suit on-going needs
• Maintaining engagement with current publishers
• Soliciting engagement from publishers not currently on scheme
• Maintaining pricing transparency and minimising price increases for members
• Benefit of market opportunity to reach new customers through the scheme
• Jisc as a trusted partner
Group purchasing framework

Challenges and opportunities - Members

• Reviewing the framework requirements to suit on-going needs of members
• Ensuring we are reaching members to engage with scheme
• Ensuring we have the mix of publishers products that fulfil members needs
• Engaging members to become champions of the group purchasing scheme vs. pursuing individual deals
Group purchasing scheme

Next steps

- **Year 2** of the scheme launches November 2019
- **Members survey** late November 2019
- **Review framework** requirements for year 3 renewal decision February 2020
- Year 2 of the scheme closes 31 July 2020

And also:

- Jisc advice and guidance on negotiating with publishers when purchasing and TDM requirements
- **Testing new ways of working with publishers** to create digital collections: [Jisc-Wiley collaboration on digitising the history of science project](#)
Our vision is for the UK to be the most digitally-advanced higher education, further education and research nation in the world.

We provide UK universities and colleges with shared digital infrastructure and services, such as the superfast Janet Network.

We help the sector save time and money by negotiating sector-wide deals with IT vendors and commercial publishers.

We offer expert and trusted advice on digital technology for education and research, built from over 30 years’ experience.
Discussion and Q/A

Paola Marchionni  paola.marchionni@jisc.ac.uk
Karen Colbron    karen.colbron@jisc.ac.uk
NERL's Negotiation Committee Outcomes

Christine Stamison
Director

Northeast Research Libraries Consortium (NERL)
NERL By the Numbers

• 30 Core Members
  • High research intensity libraries – ARL
  • Primarily private

• 110+ Affiliate Members
  • Range from ARLs to small liberal arts colleges

• Licensing more than $150 million each year in subscriptions from more than 70 publishers/content creators. All offers are opt-in.

• Based at CRL

• 2 Full time staff members and strong support from CRL
NERL Governance Structure

- **Board of Directors** - the university librarians from all NERL core member institutions
  - Responsible for the overall policy, financial and hosting decisions for the organization.
- **Executive Committee of six members of the Board** - elected by the members of the Board for terms of three years
  - Quarterly teleconference calls
- **Program Council** – comprised of a representative from all NERL core member institutions
  - Responsible for the overall program and operations for the organization
  - In person meeting at summer ALA conference; monthly webinars. No longer meeting at mid-winter conference.
- **Executive Committee of six members of the Council** - elected by the members of the Council for three year terms
  - Quarterly teleconference calls
NERL Rebranded

• In July of 2019 NorthEast Research Libraries Consortium became simply NERL

  • No longer just made up of core member libraries in the North East
  • Stanford, Vanderbilt, University of Notre Dame, University of Miami, Duke
  • New logo with the focus on Research Libraries
  • New website went live – www.nerl.org
New Mission and New Vision Statements

• Full day strategic meeting held in June of 2018
• New mission and vision statements

  • Vision: A unified force for change in the national and international scholarly communications landscape, NERL will stimulate and incubate innovative and transformation approaches to the global dissemination of knowledge.

  • Mission: A national leader in negotiated licensing, NERL maximizes effective and sustainable access to content for its member institutions. By building and supporting alliances between higher education and the information industry, NERL serves as an advocate for the collective power and influence of academic libraries and their parent institutions.
Outcomes of Strategy Meeting

• Major issues to address
  • Better communication within consortium
  • Better member engagement
  • What other resources should NERL license?
  • Stronger synergies between NERL and CRL
  • Better ways of negotiating for content
The NERL Committee to Improve Negotiations

• The NERL Program Council Executive Committee put out a charge to:
  
  • Survey current strategies employed by NERL and determine what has worked and what has not
  • Interview main stakeholders in regards to negotiations, such as NERL’s Director, Program Council Executive Committee and others who have been key negotiation leads
  • Conduct an environmental scan of negotiation best practices with similar groups (GWLA, Big Ten, CRKN, etc.)
  • Suggest a framework and training resources required to meet this framework along with a budget for those activities
  • Produce a report finalizing findings
The NERL Committee to Improve Negotiations

• Jeanne Shuttleworth (University of Pennsylvania), Chair
• Joseph Harzbecker (Boston University)
• Sally Krash (University of Massachusetts – Amherst)
• Maggie Saponaro (University of Maryland)
• Gracemary Smulewitz (Rutgers University)
• Sally Wyman (Boston College)
• Cathy Zeljak (George Washington University)
Current Negotiation Tactics

• Start process one year ahead of time
• Put together a committee to assist NERL Director to negotiate
• Pull together usage stats
• Keep increase caps as low as possible
• Review current license – what else is important? Good terms and conditions are just as important as low price caps.
  • WCAG 2.0
  • Fair Use
  • TDM – receiving full text to mine
  • Privacy issues
  • Move to NERL model license as much possible
• Discuss what has worked and what hasn’t
• In person meeting with vendor and negotiation committee to discuss what is expected.
  Need to make sure the decision maker of a vendor is present at all meetings and phone calls
• Vendor makes offer, then negotiate
New Negotiation Tactics

• Start process 1 ½ years ahead of time. Establish and share timelines and team structure, goals and priorities.
• Put together a committee to assist NERL Director to negotiate.
• Pull together usage statistics, impact factor reports, editorial board representation.
  • If many member faculty are providing editorial board services for vendor that should be taken into account to low price cap.
  • If many members are contributing to scholarship that should also be taken into account to lower pricing.
• Keep increase caps as low as possible.
• Review current license – what else is important? Good terms and conditions are just as important as low price caps.
  • WCAG 2.0
  • Fair Use
  • TDM – receiving full text to mine
  • Privacy issues
• Move to NERL model license as much possible
• Discuss what has worked and what hasn’t
New Negotiation Tactics

• Establish a checklist of desired negotiation outcomes, identifying what NERL wants to achieve and any walk-away points
  • Using a standardized form, capture expected outcomes for each negotiation and share with the committee.

• Arrive at offer. NERL sends first offer to vendor and takes control of the process

• In person meeting with vendor and negotiation committee to discuss offer. Need to make sure the decision maker of a vendor is present at all meetings and phone calls

• Vendor no longer invited to present offer in person to entire Program Committee. Only webinars will be offered to vendor. In the past vendor would come to a Program Council meeting and take up half of the three hour meeting.
Communication During the Negotiation Process

- Develop an explicit plan for each negotiation, including:
  - Establish and share timelines and team structure, goals and priorities
  - Solicit input and approval from Program Council members for the pre-established goals and priorities (both business terms and license points)
  - Develop a communication plan for the course of the negotiation
General Recommendations from Report

• Add legal expertise to NERL staffing and committees, especially if we move toward transitional licensing models

• Have director (and possible other leads) take negotiation specific training, such as
  • Sarah Durant’s Negotiation Skills Online Course [http://www.sarahdurrant.co.uk/negotiation-skills-for-librarians-online](http://www.sarahdurrant.co.uk/negotiation-skills-for-librarians-online)
  • Harvard Negotiation Master Class [https://www.pon.harvard.edu/courses-and-training/master-class/negotiation-master-class/](https://www.pon.harvard.edu/courses-and-training/master-class/negotiation-master-class/)

• Keep a log accessible to members for each publisher/vendor; document all correspondence, meetings, etc. in that one place; add to NERL notes or other standard communication path

• Use monthly program council meeting to communicate negotiations-related updates

• Understand the hot button issues for particular institutions
Takeaways

• Negotiating is a skill set that needs constant honing
• NERL has to speak as one voice and take control of all negotiations
• Need to analyze all data in a team approach
• No “free” market research. If a vendor wants market information there needs to be a quid pro quo
Discussion and Q/A

Christine Stamison  cstamison@crl.edu
ABLD & AALL: Member Advocacy and Vendor Relations

Jason Sokoloff
Washington University
Vendor Relations Liaison, Academic Business Library Directors

Deborah Heller
Pace University
Vice Chair, Committee on Vendor Relations, American Association of Law Libraries
Wrangling Business Resources

Jason Sokoloff
Head, Foster Business Library, University of Washington
Vendor Relations Liaison, Academic Business Library Directors
The business of business resources

• Professional tools that don't seem academic or scholarly
• Aggregators & third-party providers
• Search platforms are not data sources
• Access models & privacy concerns
The business of business libraries

Organization charts & budget
• Centralized campus library systems
• Business school units

Business researchers
• Business-school undergraduates, MBAs, PhDs, and specialty Master's
• Campuswide entrepreneurship and commercialization
• Anyone, really
Academic Business Library Directors

- Collaboration & sharing online, annual meetings.
- Application- and vote-based membership, capped at 50.
- Elected officers, including vendor relations liaison

ABLD collection issues
- Business of business resources (vendor relations)
- Business of business libraries
ABLD & vendors

- Unified, representative voice in vendor concerns
- Standardized pricing/access models.
- Shared experiences to inform individual negotiations.
- Annual meeting sponsorship opportunities.

Examples
- Financial Times - communication
- PitchBook – pricing, access
- Fitch Online – user privacy
AALL and Vendor Relations

Deborah L. Heller
Acting Director of the Law Library, Elisabeth Haub School of Law
Vice Chair, Committee on Relations with Information Vendors
The American Association of Law Libraries includes members from a variety of law libraries and legal information providers:

- Law Firm
- Academic
- Court
- Private
- Vendors
CRIV

Committee on Relations with Information Vendors
Charge of CRIV

The committee shall foster positive, constructive and open communication between information vendors and the membership of AALL in matters relating to provision of information in any format. The committee shall support ongoing AALL educational initiatives and provide continuing educational opportunities for both AALL members and information vendors. The committee shall serve as a forum and resource to provide constructive suggestions to vendors. The committee shall foster a cooperative working relationship between librarians and information vendors.

The committee represents the interests of all AALL members, and neither it nor its members will represent or advocate for the benefit of only one publisher or information vendor when acting in their capacity as committee members.
Tasks of CRIV

- Liaise with four of the large information vendors on behalf of members.
- Provide information through CRIV Blog
- Publish CRIV Sheet 3x/year
- Maintain a list of vendor contacts
- Provide information on fair business practices and licensing resources
Vendor Relations Policies

- Available at: https://www.aallnet.org/advocacy/vendor-relations/policies/vendor-relations-policy/

- Policies provide guidance in our interactions with the vendors

- Involve transparency of pricing, variety of format, communication with customers, simplified licensing and contracts, compatibility with existing search mechanisms, standardized usage statistics, improved bibliographic control and access, and knowledgeable customer service

- Also advocate for the preservation of materials

- Mindful of antitrust implications of advocacy
Antitrust Implications of Advocacy

• Associations can be liable for a violation of the Sherman Antitrust Act when conduct of lower-level staff and volunteers causes injury to competition.
  • True even if actions not approved by association if acting within apparent authority for association.
  • Applies when individuals act together as a group
  • Applies to any agreement among competitors that restricts competition
• No statutory exemption for professional associations like AALL or libraries
• Collective action like boycott of a vendor or seeking to impose prices or terms on a vendor can be seen as a violation.
Requests for Assistance

1. Members submit a request for assistance
2. The appropriate vendor liaison contacts the vendor to describe the problems and work on a solution
3. Liaison works with member to see if the problem is resolved
4. Large scale problems not being satisfactorily resolved are referred to the AALL Executive Board
Discussion and Q/A

Jason Sokoloff  jksok@uw.edu
Deborah Heller  dheller2@law.pace.edu
Panel Discussion: How Can CRL and NERL Best Serve Members' Interests?

Julie Linden
Director of Collection Development
Yale University Library

Monica Ward
Head of Collection Strategy
University of Ottawa

Nancy Godleski
Associate University Librarian for Collections and Core Services
Vanderbilt University
Discussion and Q/A

Julie Linden  julie.linden@yale.edu
Monica Ward  monica.ward@uottawa.ca
Nancy Godleski  nancy.godleski@Vanderbilt.Edu
Summary and Conclusion

James Simon
Vice President for Collections and Services

Center for Research Libraries
Upcoming CRL events

2020 Council of Voting Members Meeting
Thursday, April 23, 2020

CRL Global Resources Collections Forum
Thursday, April 23 - Friday, April 24, 2020

Location: Hyatt Regency Chicago in downtown Chicago on Wacker Drive

Save the date! Details to follow

Visit www.crl.edu/events
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- Find CRL on Facebook and Twitter
- Fill out our follow-up survey at http://www.surveymonkey.com/r/CRLWebinarFollowup
- Slides and a summary of this presentation will be available soon