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Barbara Kawecki

Western U.S. GOBI Library Solutions from EBSCO, bkawecki@ebSCO.com

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Transforming Library Vendor Relations: Turning Relationships into Partnerships

by **Barbara Kaweck** (Director of Customer Retention, Western U.S. GOBI Library Solutions from EBSCO) <bkaweck@ebSCO.com>

Why Partnerships and “Partnering” Matter

Yankee Book Peddler’s founder **John Secor** always upheld the vision that “partnering” was a critical strategy for success in our rapidly changing environment. What that meant was that, as a company, we had to take moving beyond the traditional “arm’s length” library-vendor relationship pretty seriously. Collaboration with both our library customers and with our publishers and later with our aggregator partners was key to our survival. In a 1998 *Against the Grain* article, **Secor** envisioned our library/vendor supply chain as a circle:

In the middle are libraries. Around the edges are those organizations that develop, produce, and deliver the products and services that libraries buy; publishers; book and periodical vendors; bibliographic utilities; system providers; etc. The library is closest to its customers and sees the services being used. It also has a sense of the evolving customer expectations. The organizations around the edges are closer to the horizon and clearly see innovative ways to deliver information. And while we will always, I think, be more independent than interdependent, we must learn to collaborate. (Secor, p. 72.)

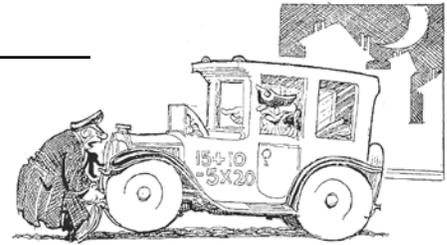
The scholarly communication/library/publishing ecosystem today, is one where we all depend upon each other for success. As **Carlson** states “it is vital that libraries and vendors recognize our mutual dependency” (Carlson, p.8.). This mutual dependency provides many opportunities for libraries and for library vendors to partner together to design products and services that enrich our market, take advantage of new advances in technology and to provide industry-wide acquisition practices that ultimately meet our patrons’ or the end user’s needs.

For vendors to provide the most valuable products and services to libraries, they must have a thorough understanding of the issues and problems that libraries face today. While direct communication is critical, vendors also need to employ staff who have been on the front lines (or in the back rooms) in libraries, whether that be at the Reference desk, as a Collection Development or Acquisitions or as a Systems Librarian. Having experienced librarians on staff, who are able to engage in the complex conversations required today, allows a vendor critical insight into the very market that we are trying to serve.

Between **EBSCO Information Services** and **GOBI Library Solutions from EBSCO** (formerly **YBP Library Services/Yankee Book Peddler**) we currently employ over 225 librarians in a variety of roles from sales to product management to collection development to training. Employing librarians gives vendors an edge as they have inside knowledge and understanding of the current initiatives, challenges and environment that libraries operate in today. This allows a vendor to be a much more valuable partner to our libraries because of this background and expertise. In essence, vendors that employ librarians can talk the talk because they have been on both sides of the table.

Why Partnering Makes Sense for Libraries and for Vendors

Why would partnering with a vendor make sense for a library? One reason is economies of scale. . . vendors can develop software, products and services faster, cheaper and more efficiently than a library could on its own. Nowhere is this more apparent than in the Integrated Library System (ILS) or Library Services Platform (LSP) sector of our industry. When I began my career as a librarian, there were lots of libraries, primarily large ARLs or consortia who had developed their own home-grown ILS systems, highly customized and built just for their workflow. Those systems are almost unheard of today. What many of these libraries discovered was that the staff to support and maintain these systems was too expensive and it was ultimately more cost effective to purchase a turn-key system than to try and build and maintain one on your own.



Secondly, while you might be an expert on your library, vendors have a much broader view of trends and directions in our market. As an example, in the normal course of the year, a vendor representative may get to visit all shapes and sizes of academic libraries in a large, multi-state territory. You might say it gives them a 35,000 foot view given how often they may be on a plane, but what this also provides for that representative is an opportunity to have their finger on the pulse of what is happening with library budgets, workflows and new directions in that region. Vendors can be a great source of information on what might be happening in terms of initiatives, jobs, consortia activities, and various cutting-edge projects. Your vendor representative may be able to put you in touch with or network you into exactly the person you need to talk to about a project or problem that you may be trying to solve.

Partnerships with libraries, publishers and other vendors like **OCLC** or eBook aggregators in our sector are more important than ever before. As a vendor tries to bring a new product or service to market, not understanding the needs of your customers can be both costly and sometimes fatal so input along the way is critical to the success of that process. Partnering with libraries for customer-driven development allows us to help you better meet your patrons’ needs and ultimately makes us a better supplier, and partner to our libraries.

Elements of Effective Partnerships

Sometimes a library approaches us as a vendor with an idea for a project and sometimes we approach them based on what we know about their interests and workflows. At the end of the day, it is critical that there be a shared vision and common goals in working together. We may be developing a product or service and need confirmation that we are moving in the right direction, so we may ask libraries to be part of an *ad hoc* focus group or to participate in a conference call to discuss the pain points of a certain workflow. One of my colleagues calls these “pop-up groups” where we might gather a group of librarians together to look at a particular project. Longer term, many vendors use advisory boards to drive and shape the direction of their development. These tend to be much longer-term commitments for librarians and since these boards are privy to information that may not be public yet, the advisory board members may be asked to sign a non-disclosure agreement (NDA) prior to accepting the appointment.

Partnering with a vendor is also an opportunity to be on the cutting edge of new products and services and sometimes there are financial incentives for being a development partner or beta library. It is also an opportunity to shape a product or service in a way that really fits or enhances your library’s workflow. When entering into these partnerships, it is important to understand that vendors are for-profit entities. They need to make money to be able to maintain and reinvest in their business and in order to fund new development for future library products and services.

Benefits of Collaboration

A successful partnership provides mutual benefits for both the library and the vendor. The library benefits from the expertise, resources and economies of scale that a vendor can offer, while the vendor benefits from the perspective and workflow knowledge that the library can provide.

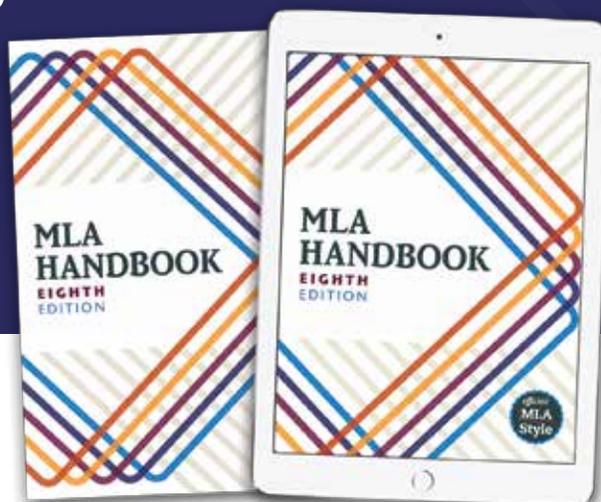
As with any collaboration, library/vendor partnerships certainly benefit from having things in writing. This allows both parties to identify common goals, clarify roles within the partnership and to outline responsibilities and expectations. In the case of projects, it may also allow an outline of deadlines, implementation dates and benchmarks.

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One of the benefits of collaboration for a library is the agility with which vendors can move. Generally, once something is on a vendor's development schedule, they can move forward pretty quickly, building functionality that meets the needs of their development partners.

Building a Partnership

Once a library and a vendor have committed to building a partnership, it is critical to document the scope of the relationship or project. As an academic bookseller, one of the best examples of this kind of documentation is the **GOBI** Memorandum of Agreement (MOA) which is, in essence, a profiling document that we develop with a library to outline all of the various components of an approval or notification plan. "At its core, the approval plan is also a man-made process rooted in communication between vendors and librarians on the one end and faculty and librarians on the other end, and everyone is expected to deliver their expertise in this process so that the right books end up in the right libraries" (Roncovic, p.7.). The result is a complex and precise set of instructions that tell the story of that library's collection development goals. The profile itself becomes a living, breathing documentation of the collection development strategy of each library and of each selector, who in turn are

Author Bio

Barbara Kawecki, Director of Customer Retention, is responsible for the management and growth of **GOBI Library Solutions from EBSCO** business throughout the western U.S. **Barbara** has more than 25 years of experience selling information products and services into the academic library market. She has served at **GOBI Library Solutions** as Senior Digital Content Sales Manager in the Western U.S. from 2010 to 2013 and prior to that worked as a Senior Collection Development Manager in the same territory from 2006 to 2010. She also had a previous position with **Yankee Book Peddler**, serving as a Territory Sales Manager from 1990 to 1992 and in between she spent 13 years working as an Academic Sales Representative and Account Services Manager at **EBSCO**. **Barbara's** professional experience includes working as the Law Librarian at the **El Paso County Law Library** in Colorado Springs and as both an Acquisitions/Collection Development Librarian and Reference/Circulation Librarian at **Colorado College**, also in Colorado Springs. **Barbara** earned her B.A. in history from **Alfred University** in New York, and her M.L.I.S. from the **University of Denver**. 🍁

working closely with their faculty. The development of the profile is a collaboration between the library and the vendor that requires much initial communication and should be updated as collecting strategies evolve.

Documentation also allows both the library and the vendor to clarify roles and expectations within the scope of the project, with implementation timelines and benchmarks built into the process. Frank and honest communication only serve to make the project more successful for both parties. This documentation can be shared with all stakeholders and can be reviewed and revised as circumstances dictate.

Ending a Partnership

Why do partnerships end? Sometimes a project is completed or just reaches its logical conclusion, but other times both parties realize that problems are insurmountable and they need to part ways. Again, it is critical to understand that we operate in a very small ecosystem. Don't burn bridges. Ending a partnership should be as professional and graceful as possible. Documenting the conclusion of a partnership is just as important so that all stakeholders can learn from the process. Keep the door open for future con-

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Library-Vendor Partnerships — An Overview of Our Symbiotic Relationships

by **J. Michael Thompson** (Assistant Director for Library Collection Services, Baylor University) <JMichael_Thompson@baylor.edu>

and **Carol Seiler** (Account Services Manager, EBSCO Information Services) <CSeiler@ebSCO.com>



The history of libraries and vendors establishing mutually beneficial partnerships likely extends to the beginning of printed word. Over the centuries, libraries have primarily relied on booksellers to provide printed content to expand their collections. Vendors and libraries still have this collection building relationship, but the digital age has allowed a proliferation of partnership avenues that were not available in the past. Typically, viable partnerships are those that provide mutual benefits that are likely to exceed costs incurred and risks taken. This article will touch on various partnerships that have formed between libraries and vendors and the benefits that result.

Arguably, the modern era of library/vendor partnerships was ushered in by the advent of the approval plan in the early 1960s. Using approval plans, vendors could identify and ship desirable books as they were published by matching the content of the book with computer-based subject profiles that had been previously established with the library. Approval plans seem passé compared to the patron driven, just-in-time access arrangements that many libraries employ today, but the introduction of this type of partnership was radical for its time. Many librarians posited that the approval plans would negatively impact library collections and ultimately harm the profession.

Fortunately, library collections and librarianship fared well with the acceptance and expansion of approval plans. The benefits to libraries of this arrangement included increased delivery speed and decreased operating costs. The plans also benefited book suppliers who received a more predictable income stream based upon the somewhat static profiles. In this case, the benefits outweighed the costs. Once the model was proven, anxiety regarding the health of both the collections and the profession abated.

As electronic resources became the preferred method of content delivery, approval-style plans evolved into patron driven acquisitions models in which patron usage determines purchases. Under these models, libraries pay for titles when a patron “triggers” a purchase by accessing the content. The result is that libraries can provide just-in-time access to useful content instead of building just-in-case collections that might never see any circulation.

Again, some librarians had concerns that library collections would suffer and costs would spiral out of control. In some instances, libraries did end up very quickly running through all the money budgeted for the plan. As a result, libraries and vendors worked together to tweak the plans in ways that decreased the likelihood of over spending. They increased the threshold for purchase triggers, more closely selected the titles available through the plan, allowed libraries to review titles before purchasing, and introduced short-term loans for a predetermined number of initial triggering events.

These measures were very successful at cutting cost, maybe too successful. Publishers and vendors felt that the rates being assessed for short-term loans were cutting into revenues more than was healthy for their finances. As a result, many participating publishers decided to raise the loan rates, institute embargos on new titles (typically 12-18 months before available for short-term loan), or completely disallow short-term loans. With these changes some librarians felt that they had been duped by publishers, while publishers felt that they were making necessary adjustments to stay in business. There are still some hard feelings on both sides of this issue, but the larger point is that vendors were willing to work with librarians on new purchasing models that, like the book approval plans that preceded them, changed the method and means of collection development going forward.

To develop and adjust services like patron driven acquisitions, it is very advantageous for libraries and vendors to find ways to develop partnerships that allow for communication in an open and honest, yet confidential, manner. One such well-established and highly successful informational partnership configuration is the library advisory board. An advisory board is a group of librarians recruited by the vendor to provide reviews and recommendations on the company’s current and future products and services. Members of the boards agree to refrain from outside discussion of the items discussed. Advisory boards can be formed around specific products or online platforms, or they can be more generally applied to the overall business of the vendor. Obviously, the benefit to the vendor is obtaining valuable ideas and feedback from their customers. The participating librarians have the advantage of directly influencing the products and services that will be offered in the future.

Beta testing relationships go beyond the advisory board’s informational model by having libraries collaboratively involved in the development of new vendor products and services. These arrangements are typically initiated by a vendor who is developing a product, for instance a new online platform. The vendor will provide the library with information and access to the product for “real world” testing. The library spends time using the nascent product and providing feedback regarding which aspects are working and desirable, and which features should be altered, revamped, or scrapped entirely. Libraries can also provide enhancement suggestions for missing functionality that could add to the usability of the product.

The process of beta testing requires time and effort on the part of both parties, but the end-results can be products and services that are more useful upon release. Because product development in a competitive environment involves issues of financial outlay and intellectual property, it is customary that a formal contractual agreement is created for the protection and direction of both parties. With the amount of time invested and money at stake, it is always advisable to delineate the exact roles and responsibilities for all participants. No one wants to invest a large amount of time and effort only to experience later disappointment stemming from differing expectations. In addition to the benefits of an improved vendor product, the agreement will often stipulate the financial benefits (i.e., price breaks upon product release) realized by the library as a result of their efforts.

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versations and engagements. We all understand that our evolving market includes the introduction of new and innovative business models and we are all actively evaluating trends for viability and new opportunities. We are all in this together.

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