2018

The Care and Feeding of Partnerships

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Partnerships, like any relationship, require care and attention to ensure that there is a productive relationship. Often it is not the funding nor technology that breaks a relationship but the human interactions that can fail and ruin the partnerships. **Stamison**, et al., note that the vendor market is a "relationship market" and care needs to be given for interpersonal relationships (2009, p. 144). **Brooks** notes that the relationship between librarians and vendors is different from most customer relationships because "the staff of the library is most often not the end-user" and the working relationship between vendors and librarians can positively impact the patron services (2006, p.1). This special relationship depends on strategies to ensure effective communication and results.

As the parameters of a partnership are determined, the participating organizations should determine who would be best to lead or facilitate the partnership. These individuals should be supportive of the partnership and committed to the goals of the project. One might assume that project participants are supportive but sometimes partnerships struggle when participants are unsure of a project or do not agree with the initiative. **Gagnon** considers the relationship between vendors and librarians an important investment that "involves building a relationship between the key library staff and the key people within the vendor's organization to foster understanding, improve service, and identify areas of mutual concern and benefit (2006, p. 96). The success of the collaboration depends on having individuals who share the goals of the relationship. In addition to having buy-in, the right positions should be considered so that a technology project includes technological experts or a data management initiative includes librarians with experience in managing datasets. Additionally, management, leadership, and interpersonal skills may be required so that there is expertise in budget oversight, facilitation techniques, or conflict management depending on the needs of the group. Typically successful partnerships are based on a mix of skills and abilities that facilitate a project so care should be taken in the selection of individuals who can advance the goals.

In undertaking a partnership, the communication patterns should be established such as the frequency, regular meetings, how to report problems, negotiate conflicts, and who should be included in meetings and communication. Establishing the patterns in the beginning forms expectations by the participants and serves as the basis for resolving miscommunications. The communication agreement should be periodically reviewed as well as updated when there are personnel changes. A communication plan helps the flow of information among partners and should be used for reporting issues and resolving problems.

As a partner, librarians are often asked to contribute to vendor work in ways that are meaningful for the vendor. This may enhance an existing relationship and connect a librarian to other individuals or facets of an organization. **Thomas** notes there are a variety of ways that librarians can demonstrate commitment to a vendor including working on product development, participating in user groups, providing references to potential customers, and serving on advisory boards (2013, p. 4). Of course, librarians should only serve in this capacity as their organization permits or within the comfort zone of the librarian.

Often with public organizations, there are considerations regarding vendor gifts or donations. Librarians need to follow state or organizational guidelines such as restrictions on gift size or reporting. There may be additional library or personal guidelines for a librarian such as a restriction on meals or acceptance of gifts including tickets to an event. Such considerations are the foundation for interacting with vendors in social situations. Within the business world, vendors are expected to host clients as a way to facilitate a relationship. This is quite different from the public sector so determining what works well for an individual or a library might require some discussions and agreements.

Many librarians have personal standards for vendor social functions and gifts that range from no gifts and meals to eat everything that is on the table! Typically librarians are thoughtful about what is acceptable for them personally which can guide their decisions. The goal is to ensure that the librarian is not influenced by the acceptance of a gift or meal. Particularly for meals, the conversation during the meal can be instrumental to building the relationship and resolving issues. Social situations may enable librarians to know company individuals or to network within the hierarchy of the organization such as the CEO who otherwise might be difficult to meet. Referring to "bigwigs," **Gagnon** identifies vendor receptions as golden opportunities to speak with company representatives about general concerns that otherwise might not receive attention (2006, p.100). Finding the balance between being purely social and purely work enables vendors and librarians to foster the relationship that may lead to addressing issues and strengthening the collaboration.

There are additional options between accepting and not accepting a meal. A librarian might attend a meal but pay for her/his own meal. A librarian might host the meal paying for the vendor. A common practice in my organization is that the library hosts the vendor when they are visiting such as paying for the dinner or providing a lunch for the meeting. The result is that the vendor is on the same level as the library in that it is not expected that the vendor always pays. It is also good for a librarian to communicate what they can or prefer to the vendor. A librarian who feels uncomfortable meeting a vendor over dinner might state her/his personal belief and suggest that they meet at another time. Vendors will respect the personal preferences or organizational guidelines but they may need to be aware so that vendors do not push or get offended if a librarian constantly declines.

Regardless of who pays, librarians need to remember that social visits or meals are still work and should conduct themselves accordingly. If a librarian is consuming alcohol, moderation is key if nothing else, avoiding agreement to a high price! Seriously, this is a working meal or event and professionalism is still to be maintained. There should not be an expectation that the vendor pays and appreciation for the event or meal should be expressed. Ensuring that the host is thanked is common courtesy including thanking the host at the event and a follow-up thank you email or note depending on the situation would be appreciated by the vendor. Before accepting a gift or attending a social event, librarians need to be aware of their organizational guidelines, local practices, and personal comfort level in addition to showing appreciation to the vendor.

Every relationship experiences problems and while the communication plan should help resolve issues that does not always happen. Ideally, problems should be identified, reported, discussed, and resolved at the time that they occur. Solving the problem as close to the time that it occurred helps in the specificity of the details with the individuals who were involved. Documenting the problem including the details and individuals involved will help should the problem continue or repeat. The details will also be useful should one of the partners need to escalate the issue in order to seek a resolution. "Sometimes library staff seem to expect vendors to be psychic and understand needs and frustrations that actually have not been communicated. This is unfair and not useful… service cannot improve without constructive feedback" (**Stamison**, et al., 2009, p. 143). Many vendors have a problem reporting tool or customer service issues. Unless the communication plan guides otherwise, the problem reporting protocol not only ensures that the issue is reported but it is a documentation of the issues. When reporting, be specific as to the details of the issue and note possible impacts on library services. The reporting should also provide the urgency or non-urgency of the problem. This gives specific details to help determine the priority of the problem.

Partners should have frequent and productive communications but sometimes partnerships run into problems when one partner fails to regularly communicate or ignores issues until it becomes a list of grievances. In such situations, the partnership may be damaged and success unlikely. Holding a list of problems or issues until it builds to a level of frustration can ruin a partnership. Another communication failure is when complaints are directed at the wrong people. A partner might gripe or complain to a person who is unable to resolve the situation or a minor problem is reported to a high level administrator. When a situation is not being addressed, a partner should work it up the chain of command. **Stamison**, et al., suggest that an "escalation list" be provided to librarians so as problems become more complex, librarians will know who to contact in succession (2009, p.145). Addressing problems in relationships at the point of occurrence with specificity with the right people or appropriate protocol should help to keep issues to a minimum. Should that fail, working through the issue with the correct reporting method with the right people will hopefully result in resolution.

Anderson notes that for the most part, vendors are honorable people and "they should be treated as such until they give a good reason to do otherwise" as librarians maintain a professional demeanor (2005, p.324). At the core of any relationship, professionalism and courtesy should guide partners. In forming a partnership, librarians and vendors will be more successful if they establish protocols for working together and constantly attend to the communication. This foundation is essential for a positive working relationship to achieve mutual goals.

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Consortial Partnerships with Libraries and Vendors

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Introduction

By definition, library consortia are partnerships between libraries to accomplish common goals such as reducing costs, sharing expertise, and enhancing services. Consortia then work with vendors, publishers and others on licensing and services to better meet the local library mission to various constituencies.

Since the advent of ejournals, eBooks, and other e-resources on the Web, library consortia have played an increasingly important role in aggregating group deals and acting as an agent on behalf of libraries. This has introduced another player in the complex world of licensing with both benefits and challenges. It's not unusual that when a library wants to license a new product that they have several players with which to contend including a consortia, an intermediate vendor such as **GOBI** or **OASIS**, and the publisher or vendor licensing the product. To complicate matters, many libraries belong to multiple consortia and if they happen to be offering the same product or service the library must determine which group to work through. These decisions could be driven by regional allegiances, which organization is offering the best pricing (including terms and conditions), and the need to view the bigger ecosystem to create the best benefit for the library community and end users.

Consortial Role in Licensing

Although some library consortia have been around for many decades, the modern consortial movement can be marked by the advent of the Web with the concomitant move of much library content from print to digital. In the mid-1990s, consortial leaders began to meet at the **American Library Association** and the informal community eventually coalesced to become the **International Coalition of Library Consortia (ICOLC)** which now includes hundreds of library consortia from around the world. One of the big reasons for the revival of the consortial movement was the financial opportunities that could be possible through centralized licensing, bringing together libraries and providers to create a greater volume of licensing, lowered costs, and efficiencies in operation.

Library consortia are primarily responsible for the development of the modern day "big deal" and the term was coined, or brought into the common vernacular, very early by **Tom Sanville** at **OhioLink**. Although there are many variants of this type of deal, it is characterized by libraries consolidating their journal subscriptions into a single contract with the publisher and then each library will get access to everything offered by that publisher or at least get access to the collective holdings of that group. It was successful for publishers because they could lock-in library expendi-

tures. Libraries were happy for increased content at the same price and publishers were protecting their revenue stream. Of course big deals bring a host of other problems which were recognized very early (Frazier, 2001; Gatten/Sanville, 2004) but they have largely remained in place since backing out causes a huge drop in available content disproportionate to the savings. One of the effects of the big deal has been a huge drop in revenue for intermediate commercial serial vendors, as consortia cherry-picked some of the largest packages for their members.

In the scholarly monographic world, consortia have been aggressive in a variety of areas. Group purchases of eBook packages from major publishers have played a major role in reducing unit costs for monographs. Library consortia have also played a big role in demand driven acquisition (DDA) and evidence-based monographic purchasing. Many academic libraries are moving away from title-by-title purchasing, except for specialty purchasing and individual requests, and depend on these larger cooperatives for the largest portion of their monographic expenditures.

Every library consortium is different in terms of funding, governance and functional areas. This translates into many variations on how deals are developed and funded. The consortial role in e-resource licensing has been successful due to the many benefits that are offered to member libraries. Examples include:

- Lowered costs through volume licensing
- Lower inflation rates for individual contracts due to strong negotiations on behalf of a group
- A single point of contact for the vendor for billing
- A single license for the group which mitigates many local variations
- Many consortia act as extensions of a local library's collection development and acquisitions department; thus allowing a local library to do more with smaller staff.
- Deep expertise in contract negotiation for better pricing as well as more standard terms and conditions
- Greater attention from a publisher or vendor which can extend to smaller libraries
- Some consortia act as a repository for funds to cross fiscal years for a local library
- Developing specialized partnerships with vendors and publishers for special projects in ways that an individual library cannot