

Working Together: Academic Law Librarians and CALR Vendors*

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Ms. McMurrer describes the efforts of the AALL Academic Law Libraries Special Interest Section to address relations with CALR vendors, focusing on the development of its “Qualities of an Ideal CALR Vendor-Library Relationship” document which is appended to the article.

¶1 The Academic Law Libraries Special Interest Section (ALL-SIS) of the American Association of Law Libraries formed its Roundtable: Dialog with LEXIS and Westlaw in 1998.¹ According to its first chair, Rosalie Sanderson,² relations with these two computer-assisted legal research (CALR) vendors long had been a topic of discussion when academic law librarians met informally during AALL Annual Meetings. Programs, such as the one in 1997 about managing vendor student employees,³ had focused on relationship issues. The roundtable thus satisfied a need for librarians to share information among themselves and get answers from vendors about common questions.

¶2 During the 1990s, the vendors were providing computers for general student use as well as printers devoted to their products. Those first roundtable meetings sometimes involved heated discussions about the fairness of equipment distribution and equality of vendor support. Vendor policies, for instance, about password and ID distribution, were hotly debated. There often seemed to be an almost adversarial atmosphere involving angry librarians and defensive vendor representatives.

¶3 At the 2001 AALL Annual Meeting, Sanderson decided to refocus the roundtable’s meeting. She asked LexisNexis and Westlaw representatives to forego their usual presentations⁴ so that we librarians could meet separately before asking

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1. The first ALL-SIS roundtable met jointly with a similarly focused RIPS-SIS roundtable on July 19, 1999, at the 92nd Annual Meeting of the American Association of Law Libraries in Washington, D.C.
2. Rosalie Sanderson was chair of the roundtable from 1998–99 through 2000–01.
3. Managing Shifting Levels of Support from LEXIS and Westlaw in the Academic Law Library: Coping Strategies, program presented at 90th Annual Meeting of the American Association of Law Libraries, Baltimore (July 22, 1997) (audiotape available from Mobiltape Co.).
4. The vendors had typically taken the first part of the roundtable meeting to introduce staff and to present upcoming product innovations. Sometimes these presentations took up the major part of the meeting, leaving little time for questions.

the vendor representatives to join us for questions. During that first part of the meeting, the librarians in attendance brainstormed to develop lists of vendor policies that we thought worked well in our schools as well as areas where we saw room for improvement. When the vendors joined us, we shared both lists with them.

¶4 There was general agreement that looking at success stories as well as complaints had changed the tone of the meeting. One librarian suggested that law librarians and vendors would benefit from a guide that described how the parties could best work together. A committee, composed of Mike Bushbaum,⁵ Suzanne Cassidy,⁶ Stephanie Davidson,⁷ Margaret Leary,⁸ Jane Underwood,⁹ and I (as chair) undertook to draft such a document for the roundtable to consider at the next Annual Meeting in 2002.

¶5 Margaret Leary prepared the initial draft, which committee members then reviewed and offered additions and changes. We also sent the draft to Timothy List, director of Academic Accounts with LexisNexis, and Joni Marra, director of Academic Account Management for Westlaw. Both of them asked for feedback from their account managers across the country and then sent us proposed modifications as well.

¶6 The resulting document, titled "Qualities of an Ideal CALR Vendor-Library Relationship," was presented to the roundtable at the 2002 Annual Meeting. In addition to LexisNexis and Westlaw, I invited representatives from the other CALR vendors that had law student programs for their products: Loislaw, Quicklaw America, and VersusLaw. Craig Garrett, manager of Communications and Customer Relations of Loislaw, and Philip Rosenthal, president of Fastcase Inc., a new CALR vendor, attended. After a general discussion among librarians and vendor representatives, a few changes were proposed and accepted, and the document was adopted.

¶7 Both librarians and vendor representatives supported a motion to ask the ALL-SIS to adopt the ideal relationship document as a set of goals. Prior to its consideration by the ALL-SIS board, we sent the document to AALL's Committee on Relations with Information Vendors (CRIV) to ensure that it comported with the committee's policies and aims and did not impinge on its jurisdiction. CRIV indicated its approval and distributed the document to the law librarian community via an e-mailed "CRIV Gram."¹⁰ The document was adopted by the ALL-SIS Executive Board on July 12, 2003.

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5. Educational Services Librarian, Valparaiso University School of Law Library, Valparaiso, Indiana.
 6. Director of the Law Library and Associate Professor of Law, Mercer University Law Library, Macon Georgia.
 7. Reference and Electronic Resources Librarian, Lillian Goldman Library, Yale Law School, New Haven, Connecticut.
 8. Director and Adjunct Lecturer, University of Michigan Law Library, Ann Arbor, Michigan.
 9. Reference Librarian, Capital University Law Library, Columbus, Ohio.
 10. Carol Rogers, CRIVGram: Qualities of an Ideal CALR Vendor-Library Relationship (Mar. 3, 2003), at <http://www.aallnet.org/committee/criv/mediation/gram2003/030303.htm>.

Scope

¶8 In its final form,¹¹ “Qualities of an Ideal CALR Vendor-Library Relationship” describes the type of relationship between CALR vendors and law school librarians that would best serve the interests of law students. It is divided into three parts: People, Products, and Services. It is not designed to be a rigid set of rules, since every school functions a bit differently. Instead, it is a set of goals to be modified to meet the needs of each school. At the very least, it attempts to highlight the areas of interaction that librarian CALR coordinators may wish to address with vendor representatives.

¶9 In addition, understanding that principles can sometimes be a little vague, we added some specific actions that would help accomplish the goals and demonstrate that the principles are working. We called each of these a “sign of success.” The signs are examples and are not meant to be exhaustive.

¶10 LexisNexis and Westlaw, with both full-time employees who work solely with law schools and part-time student representatives, have the largest presence in law schools. Many law schools have hardware provided by those vendors as well. The document was drafted with these two vendors specifically in mind. However, other CALR vendors also have law student access programs (presently this includes Loislaw, Quicklaw America, and VersusLaw), though without the level of support provided by LexisNexis and Westlaw. Thus, some of the specific sections of the document do not apply to them. Nevertheless, the principles expressed are applicable and were enthusiastically supported by all the vendors present at the 2002 roundtable.

¶11 What is the future for this Ideal Relationship document? Even as it was being adopted in 2002, there were suggestions of additional areas that might be covered. Though no formal mechanism for amending or reviewing it presently exists, this is a document meant to be changed and to evolve. From its inception, we anticipated that, as new issues arise, the Relations with Vendors Committee would consider modifying the document to address them. Our hope is that all parties will find the document a useful guide for their relationships and will suggest changes whenever they are needed.

11. See *infra* pp. 572–77.