

Qualities of an Ideal CALR Vendor-Library Relationship, With Benchmark Signs of Success*

Adopted by the Executive Board of the AALL Academic
Law Libraries Special Interest Section, July 12, 2003.

Objective: To establish general guidelines to ensure that the relationship is based upon mutual educational goals, clear communication, and the best interests of the students. This is a working document that should be tailored to meet the specific needs of each school.

1. People

- a. Vendor and Library each assign a single person to be the key contact. Replacements for key contacts are selected as quickly as possible and interim key contacts are designated when necessary.

Sign of success: Each key contact knows the other's phone, e-mail, and other addresses and contact methods. Each knows the other's schedule and the best way to get in touch. Each knows the other's preferred communication method.

Sign of success: Key contacts share mutual respect and a commitment to solving problems.

Sign of success: The other party orients new or replacement key contacts about its institution, procedures, goals, expectations, and upcoming activities to ensure continued and uninterrupted quality service.

- b. All requests for and offers of services and questions about policy are funneled through the key contacts unless the parties agree otherwise. These communication routes are understood by Vendor and Library and have been formulated with input from the other party.

Sign of success: Library key contact understands the procedures for asking about policies such as ID/password restrictions or extensions. Vendor key contact understands such items as the procedures for arranging classes or product demonstrations for faculty or students.

Sign of success: Both Vendor and Library understand whether all such communications must be directed initially through the key contacts.

* © Academic Law Libraries Special Interest Section, American Association of Law Libraries, 2003. For an electronic version of the document, along with background and scope information, see RELATIONS WITH VENDORS COMM., AALL ACADEMIC LAW LIBRARIES SPECIAL INTEREST SECTION, QUALITIES OF AN IDEAL CALR VENDOR-LIBRARY RELATIONSHIP, WITH BENCHMARK SIGNS OF SUCCESS, at http://www.aallnet.org/sis/allsis/calr_roundtable.html (updated Feb. 27, 2003).

- c. Key contacts are each responsible for making sure that their coworkers know the other's employees with whom they will need to interact, including their roles and responsibilities.
Sign of success: Librarians, Library staff, and student employees of the Library, where necessary, know the Vendor's representatives and the student employees of the Vendor; contact information is kept current and easily accessible to those who may need it (rolodexes, wall signs, websites). Vendor representatives know key personnel in the Library such as those who supervise the Library's student employees or who have primary responsibility for the CALR room, computer lab, and/or training lab and equipment.
- d. Key contacts take the initiative to introduce new people and to get all involved together as often as needed to facilitate effective communication.
Sign of success: People know each other before there is a problem to solve.
Sign of success: Periodic meetings or other regular communications ensure that there are no unresolved or outstanding issues.
- e. Key contacts share the goal of working collaboratively to identify and solve problems related to providing the CALR product.
Sign of success: Local key contacts, who best understand the problems, attempt to solve them at that level. Library and Vendor key contacts respect the other's chain of command and deal directly with the key contact before approaching others.
Sign of success: Problems result in constructive conversations and solutions that are consistent with the objectives and policies of Vendor and Library.
- f. Vendor student employees: Vendor and Library have a clear understanding about their respective roles in relation to Vendor student employees. If Library chooses to be involved with hiring, there is a clear understanding of Library's role and any standards the Law School and Library use.
Sign of success: Vendor student employees are aware and respectful of both parties' expectations, goals, and policies. They are well-trained in the use of the Vendor's products. Their office hours are posted and students know where to find that schedule. They are visible and responsive to student and Library needs.
Sign of success: Vendor and Library reach agreement regarding the work schedules and duties of Vendor's student employees, and the student employees' schedules are communicated to all interested parties.
- g. Vendor and Library agree how the duties handled by Vendor's stu-

dent employees during the normal school year will be covered in the summer and during other semester/quarter breaks.

Sign of success: Duties normally performed during the school year by Vendor's student employees are accomplished with a minimum of disruption in the summer and during breaks.

2. Products

- a. Computers: Key contacts share a mutual understanding about responsibilities for purchasing and maintaining computer equipment.

Sign of success: Equipment functions on a consistent and reliable basis.

Sign of success: Library knows whom to contact for assistance when computer hardware maintenance problems arise. Vendor knows whom to contact concerning additional product placement and desktop issues.

- b. Printers and hotlines: Key contacts share a mutual understanding about responsibilities for purchasing and maintaining printers, including delivery and storage of paper and toner, dealing with printouts, and troubleshooting and/or calling for printer repairs. Key contacts also share a mutual understanding about responsibilities for providing and maintaining Vendor "hotline" phones.

Sign of success: Law students are confident that printers will be stocked with paper and a working toner cartridge, that a sign will notify them if the printer is not working, and that problems will be resolved as quickly as possible.

Sign of success: Law students know where to pick up print jobs they cannot claim immediately and how long printouts are stored before being discarded.

Sign of success: The responsible Library and Vendor employees know what to do and/or whom to contact for assistance in resolving problems with printers and hotline phones. They know who is responsible for arranging each portion of the hotline service (e.g., telephone company, university, or law school department) and whether Vendor or Library must initiate a request for service on the line.

- c. Vendor print products (signs, brochures, guides, directories): Key contacts discuss and agree about the type of educational print products that will be most effective for student learning. Key contacts understand and respect each other's goals and limitations and work together to develop processes that work for both.

Sign of success: Library, Vendor, and Vendor student employees know where material can be stored; they inform each other about delivery schedules, address information, and other logistics. Key contacts agree on the amount of material that can be stored at

any time and on a process for dealing with exceptional situations during which those amounts might be exceeded. Packaging, such as boxes and filler, are properly discarded. Vendor promptly removes out of date material and disposes of it properly.

Sign of success: Library, Vendor, and Vendor student employees know where material can be posted and know the reason for the limits. Each works to avoid exceeding the limits, and there is agreement on what can be done with material posted beyond them.

- d. Vendor prizes or gifts, such as shirts, candy, or lotteries, and table days: Key contacts understand what Vendor will provide during the school term and any limits Library places on the use of prizes or gifts. Key contacts have a mutual understanding of Vendor table days, including their value to students and their scheduling.

Sign of success: Vendor respects the limits Library places on the use of prizes or gifts. Students understand that the gifts or prizes come from the Vendors, not from the Library.

Sign of success: Library and Vendor share a mutual understanding about the procedures for scheduling table days and Library is aware of the product features emphasized during a particular display. Vendor and Library have a clear understanding about which spaces may be used for local giveaways or table displays and the procedures for reserving them.

3. Services

- a. Instructional mission: Library and Vendor share a mutual educational goal in CALR training. Library recognizes that Vendor also has a marketing goal, but both acknowledge that education is the primary focus of training in the law school setting.

Sign of success: Both parties understand the other's educational goals and both parties focus their training to meet the best interests of the students. Each refers students as appropriate to the other's training programs.

Sign of success: Vendor and Library work together to advertise training opportunities.

Sign of success: When Vendor provides training in courses for which Library is responsible (e.g., advanced legal research, first year training sessions), the librarian instructor provides clear direction and scope information to Vendor about what training is needed, and the instructor, when possible, attends the session. Vendor follows the instructor's directions and uses timely materials that are relevant to the subject covered. If the Vendor provides substitute trainers, Library is informed about the

substitution, and any special instructions from the Library concerning training are transmitted to the substitute trainer.

- b. Instructional procedures: Vendor and Library have a clear understanding about how to schedule the computer lab, training lab, or CALR room for instructional purposes, including what advance notice is needed, how to handle walk-ins who want to use the room, and other practical matters.

Sign of success: Training class logistics are handled with a minimum of confusion.

- c. Library and Vendor share a mutual understanding about special and advanced training classes for students or student groups (e.g., summer clerks, law review boards, moot court boards).

Sign of success: Vendor knows whether the offer of such classes must be directed initially through Library's key contact.

Sign of success: Library and Vendor continue to explore ways to increase student exposure to advanced training.

- d. Training for faculty and staff: Vendor and Library share a goal of addressing the training needs of faculty and staff.

Sign of success: Vendor and Library work together to provide current, relevant training for faculty and staff; they explore the timing of training in order to optimize faculty and staff participation.

Sign of success: Vendor knows whether proposals for such training must be directed initially through the Library key contact.

- e. Training for librarians: Vendor and Library share a goal of ensuring that librarians have all current information about content and features of Vendor's products.

Sign of success: Vendor provides annual, or more frequent, training sessions for librarians. Library provides annual, or more frequent, informational sessions for Vendor on Library's plans for teaching and other uses of Vendor's product.

- f. Vendor provides as much notice as possible about special training opportunities offered by out-of-town Vendor experts (e.g., in a particular subject area or about particular features or products) and Library make requests for particular training or materials in a timely manner.

Sign of success: Both parties have enough time to make arrangements for instructional classes.

- g. Library maintains neutrality among online CALR services, though strengths and weaknesses are discussed with students, faculty, and staff. Vendor and Vendor student employees do not disparage others' products or personnel.

Sign of success: Vendor key contacts are respectful of each other. Library and Vendors work together to prevent scheduling conflicts.

Sign of success: Vendor and Vendor student employees present their own product positively, but stop short of negative comments about others. Library presents balanced views of all products, which may include comparisons among products, but Library does not promote one product over the other.