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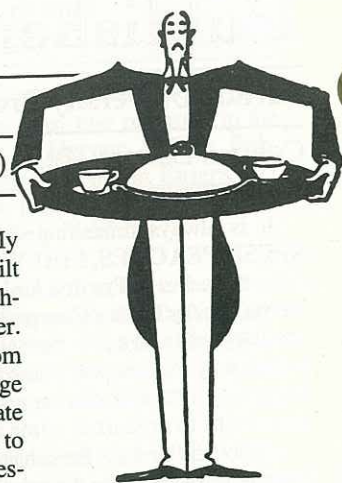
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Marketing to Libraries

Librarians' Views

by Vikki Medaglia (Bates College) (vmedagl@bates.edu)



In the first of these interviews, I talked with a representative from a publisher; in the next I talked with a vendor. To complete the picture, I have asked two librarians to describe how they perceive the "library market."

Pat Phillips is Head of Technical Services at Sewanee, the University of the South. She has almost thirty years' experience in technical services. Sewanee is a small, private liberal arts college serving 1,200 undergraduate and 80 graduate students. The materials budget is \$700,000.00. Sewanee is a member of a consortium, called *Associated Colleges of the South*, which is composed of thirteen private liberal arts colleges from Texas to Virginia.

Tia Gozzi speaks from the vantage point of one who has spent eighteen years in, or responsible for, Acquisitions in two large research libraries: *Syracuse University* and *Stanford*. She is currently Associate Director, Library and Information Services, at the University of North Carolina at Charlotte.

VM: What does the "library market" look like from the vantage point of a small liberal arts college?

PP: For my purposes, I need my major vendor to supply as many of my orders as possible. By combining approval plans and sending most requests to one vendor, I was able to negotiate a better discount. It is more efficient to process large invoices and one single payment to one vendor than multiple small invoices with multiple payments. It also reduces the possibility of unintentional duplicates.

VM: And from the vantage point of someone in acquisitions in a large research library?

TG: It used to be that the large research library marketplace was more stable and predictable. As budgets have been cut and subjected to increasing pressures I've developed enormous sympathy for those trying to second-guess what large libraries will spend from year to year, what they'll spend it on, to what degree they will rob the traditional "Peter" to afford the less-traditional "Paul", what services they will demand from the marketplace that they used to consider theirs to provide, and who is the critical decision maker to whom "marketing efforts" should be directed. Even when a vendor, say, decides to "specialize" in terms of the marketplace, over the last few years the ground must have seemed to be in perpetual motion (if not upheaval).

VM: What leverage do you feel you and others like you have in the marketplace?

PP: The most important element in the vendor/library relationship is the customer service rep. My major vendor is very responsive to my needs and provides everything I need at the moment. I am not sure what I will need in the future but my major vendor is in the forefront of new ventures such as working with **OCLC** on **PromptCat**, for example. Computers are necessary in order to handle the volume, but computers cannot fix problems or under-

stand the needs of the library. My vendor representative and I have built an excellent understanding of each others' needs, and we work well together. I have withdrawn other vendors from my vendor list (including one large vendor with whom we had a separate approval plan) because they failed to respond to requests or made excessive errors. The account service person must also be very responsive and immediately take care of any problem or question. This level of service is very important.

TG: One only has to send out an RFP asking about the availability of new services, or indicating the possibility of switching a large list of serial subscriptions to another source to realize just how much leverage the large libraries have in the vendor community. The phone begins to ring, the reps begin to call. The thoroughness of the responses is awesome in many cases. As **John Secor** stated in his April interview in this column, "... the library market is extraordinarily competitive today," (See *Against the Grain*, April 1995, p. 51 for this interview with **John Secor** and **Gary Shirk**.) and in large measure it is the mushrooming demands of the large research library (as well as ubiquitous technology, etc.) that is driving the marketplace in specific directions. Nevertheless, I couldn't agree more with the point Pat makes about the critical importance of the relationship between the librarians and the vendor's staff. "Leverage" should not imply a license to take unfair advantage.

VM: What pressures do you feel from vendors and publishers?

PP: We are looking at more cooperative purchases in the consortium to which we belong, and the consortium will be negotiating with vendors for site licenses, shared databases, etc. We will also be looking at having shared core periodicals. It will be very interesting to see how this affects our purchasing and what types of information we will be sharing, but I see the approval plan continuing to be a vital part of building the collection. We have spent a number of years fine-tuning the profile and I think it partially makes up for the narrow focus of faculty selection.

TG: In the case of vendors to large libraries, I think the shoe is on the other foot — it's librarians who are exerting the pressures: pressures to develop and provide more and more of the services that have traditionally been the responsibility of the library; pressures to provide bigger discounts and more pricing options so that shrinking budgets and budgets that must stretch over more territory can hold out a while longer; pressures to form partnerships in the search for alternatives that will reduce our collective costs and ensure our collective survival, albeit in a transformed state; pressures to help move us all in the direction of creating a richer, but not more confusing or overwhelming, information environment.

The pace of change in the acquisitions world is no longer deliberate and evolutionary — it is often floundering and chaotic. In

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the large research environments that I know, little time is spent these days debating the relative merits of approval plans versus firm ordering, direct from source versus via a middleman, the dangers of having all one's eggs in one basket, except insofar as these questions are related to overall reduction of costs and streamlining of work flows. This must mean that the vendor community is, of necessity, giving presentations and promotional literature a different emphasis. It also means that on visits to large libraries vendors are attempting to widen their audience. It would be interesting to know how much time they are now spending with individual bibliographers as opposed to administrators, with staff in operations as opposed to managers.

VM: What are some of the concerns that will occupy Acquisitions Librarians in the foreseeable future?

PP: We are very much concerned with the issues of shifting from print to electronic format: copyright considerations, how to operate in a networked environment with other members of the consortium, and improving efficiency using new technologies. We received a grant from the **Mellon Foundation** to study these issues and we will be having visits from consultants to assist us in developing some solutions to these questions.

TG: As Pat suggests, there is lots of discussion about the ownership to access shift, the print to electronic swing, copyright and licensing dilemmas, "outsourcing" as an alternative to traditional processing work flows. It is my observation, however, that these interesting issues are investigated and debated by acquisitions librarians in large libraries (and probably small ones too) only "after hours." The hours between 9:00 and 5:00 are consumed more and more in helping staff (and themselves) cope with the revolutionary changes in their work lives. Not only are staff faced with finding new, satisfying roles for themselves as more and more of the routine processes are automated, but they must also find ways to enhance their general technical skill levels. The Internet and its features are increasingly relevant to ALL staff, including acquisitions staff. The result is often a stressed, worried, insecure, distracted group of people for managers to motivate, console, cajole, inspire, and help — a very large additional workload even when the transformation begins to occur and excite. In "re-tooling" and "re-potting" the rewards are often delayed and/or unacknowledged.

VM: What are some of the options vendors or publishers offer that work well for you?

PP: The approval plan has been the most effective option to assist in building the collection and to provide the most current materials as soon as they are published. The approval plan has enabled Tech Services to keep up with increases in the budget without increases in staff.

TG: The list is getting longer for large research libraries. Of the more traditional services, approval plans continue to afford real economies, as do deposit accounts, customized reports, and vendor visits. More recently, electronic transfer of invoice and bibliographic information, processing services, online ordering, and access via the Internet to the vendors' databases and personnel are reaping big savings for both communities. The "advisory" or "co-development" groups or meetings that some vendors and publishers

have initiated also offer excellent opportunities for all to learn and explore options together.

VM: What other kinds of products and services would you like to have available?

PP: At this point I am not sure what the acquisitions process will look like in the future. I expect that my vendor will keep pace with the changes and provide whatever new services the market demands.

TG: Asking this question is as dangerous as letting a chocaholic tell the Easter Bunny what she wants to find in her basket. My fear is that the fiscal viability of some vendors is again being stretched and tested by the latest flurry of "wish lists" (aka RFIs) concerning technical processing services. The trick will be to successfully accomplish, one more time, what **John Secor** calls "a tightrope act." But, since you've invited me into the candy store . . . it would be wonderful if some vendor would develop a consolidated service to supply the library with the most cost-effective mix of actual journal subscriptions and document delivery service to magically meet the needs of its clientele! 🐰

We've heard from a publisher, a vendor, and two librarians. It must be my turn; in the next issue. I'll summarize and try to draw conclusions from their comments. I'd welcome your feedback. Has this column helped clarify "marketing" and "the library market"? What questions remain unanswered? Do you take issue with anything any of us have said? How is it different (or similar) in your worlds? From whom would you like to hear next?

Announcement



We're pleased to announce that Sage Periodicals Press is the new owner and publisher of the *Journal of Family History* (ISSN: 0363-1990).

Beginning with volume 21, number 1 (January 1996), Sage will publish the *Journal of Family History* on a quarterly basis in January, April, July and October.

The *Journal of Family History* is the premier scholarly publication focusing on historically based studies on families, kinship and demography. The National Council on Family Relations will continue its sponsorship of the *Journal of Family History*, and Sage is proud to carry on this 20-year tradition of scholarly excellence and service to the field.

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