Portland State University
PDXScholar

Library Faculty Publications and Presentations   University Library

2-2014

The Charleston Conference Continues – Getting to No: Calling for an End to Contention

James Bunnelle
Lewis & Clark College

Jill Emery
Portland State University, jemery@pdx.edu

Michael Levine-Clark
University of Denver

Emily McElroy
University of Nebraska Medical Center

Anne McKee
Greater Western Library Alliance

See next page for additional authors

Let us know how access to this document benefits you.

Follow this and additional works at: http://pdxscholar.library.pdx.edu/ulib_fac

Part of the Library and Information Science Commons

Citation Details

Authors

James Bunnelle, Jill Emery, Michael Levine-Clark, Emily McElroy, Anne McKee, and Mary Page

The Charleston Conference Continues — Getting to No: Calling for an End to Contention

by **James Bunnelle** (Acquisitions/Collection Development Librarian, Lewis & Clark College); **Jill Emery** (Collection Development Librarian, Portland State University); **Michael Levine-Clark** (Associate Dean for Scholarly Communications and Collections Services, University of Denver); **Emily McElroy** (Library Director, University of Nebraska Medical Center); **Anne McKee** (Program Officer for Resource Sharing, Greater Western Library Alliance (GWLA); and **Mary Page** (Associate Director for Collections and Technical Services, University of Central Florida)

To open the thirty-third **Charleston Conference**, **Jenica Rogers** (SUNY Potsdam) gave a plenary talk titled "Librarians in the Post-Digital Information Era: Reclaiming Our Rights and Responsibilities…Or, Calling for an End to Deer in Stockholm." (*http://bit.ly/1bA3MGM*) In it, **Ms. Rogers** challenged librarians to stop accepting the status quo in their relationships with publishers and vendors. In this talk and subsequent blog posts (*http://www.attemptingelegance.com/*), she made some good points: In negotiations with content suppliers, librarians have every right to be treated respectfully, and pricing models should be transparent and clearly articulated. As she stated, librarians are smart, agile, and creative professionals. In post-conference tweets, **Ms. Rogers** also promoted this blog post by **Martha Heller**, which outlines six steps for sales force best practices from a Chief Information Officer (*http://bit.ly/ILp8G7*):

- Do your homework
- Build the relationship
- Integrity, honesty, and transparency
- Prospecting
- Pitching
- Support

Represent the Librarian Point of View?

We also support these universal attributes of a healthy market with trusted trading partners. Where we differ with **Ms. Rogers** is in her confrontational approach and her assumption that most publishers and vendors treat us unfairly. While **Ms. Rogers** said that she was not referring to all vendors or all librarians, her emphasis on the negative left a bleak impression of librarians' history of negotiating with vendors for fair terms. First and foremost, when dealing with publishers and vendors, it should be acknowledged that librarians come to the negotiation table with a

certain amount of privilege. Librarians choose to pay for the services and content we purchase on behalf of our patrons. We are at the table to resolve a business transaction. In business terms, fairness refers to practices that are without favoritism and free from self-interest. (*http://www.merriam-webster.com/dictionary/fairness*) Our experiences in working with other members of the information supply chain have not been unfair; they have been an exploration of understanding what is mutually beneficial to both sides at the negotiating table. Though **Ms. Rogers** claims to speak for the library profession, the experiences she described are unlike anything we have witnessed.

The authors of this paper have each been involved in direct vendor negotiations on behalf of a wide range of library types for an average of sixteen years. We have worked with vendor colleagues on **ALA**, **ALCTS**, **LLAMA**, **NASIG**, **NISO**, and **RUSA** committees. We have worked with librarians who accepted positions with vendors or publishers, and vendor representatives who decided to rejoin the library side of the community. One of our authors has worked as a librarian in a library, a subscription agent, and a consortium. Ours is a fluid community, and we are enriched when we share experiences from all perspectives.

We do not consider ourselves to be librarians (or deer) caught in the headlights. We have publicly expressed concerns about various publishing and pricing models in presentations, in writing, and in our institutional campaigns against a particular product. In our experience, the librarians that **Ms. Rogers** portrayed as timid and naive in their approach to negotiations, passively allowing vendors and consortia to walk all over them, are the exception. Her antagonistic stance toward

vendors, whom we find generally share our goals of improving scholarly communication and enhancing the educational environment at our institutions, is counterproductive. On more than one occasion in her talk, she referred to vendors as "manipulative" and "liars." Those are strong words.

During the Q&A portion of her presentation, a facilitator suggested that **Ms. Rogers** participate in advisory boards. We agree that librarian participation in advisory boards is a sound way to share ideas on business models, product development, and scholarly communication. Together, we have served on numerous commercial, university press, and society publisher advisory boards, including **AMA**, **Cambridge University Press**, **Emerald**, **Ingenta**, **Nature**, **NEJM**, **Oxford University Press**, **Palgrave Macmillan**, **PNAS**, **SAGE**, **Springer**, and **Wiley**. Through service on advisory boards and working with vendors on products and services, we have improved services for our institutions and for libraries generally. We are not unique. A review of the **2013 Charleston Conference Program** shows that many of the sessions featured vendors and librarians presenting together on successful projects or discussing joint concerns. Though **Ms. Rogers** claimed to represent the librarian perspective, a look at the programs following her presentation that morning demonstrates that many librarians value and benefit from collaboration with vendors. Joint program topics included: how vendor partnerships can improve the end user experience; leveraging grants to gain faculty collaboration; providing streaming resources; research and assessment of mobile devices; OpenURL success metrics; open source discovery layers; social side of research opportunities; and selecting course content.

Rights and Responsibilities

One of our main goals, as librarians, has been to provide access to the content our users need. The desire to achieve this end has often meant having difficult and protracted negotiations with providers, where both parties mutually acknowledge their respective goals and assume positive intent. Often, librarians do not fully understand the costs associated with scholarly publishing and the mechanisms used by the entire publishing spectrum to produce content. Librarians must be willing to listen and invest as much effort into understanding the financial aspects of content creation as we do in providing access to that content. Librarians who have an informed understanding of the base costs and processes are in a stronger position to ask where cost efficiencies can be achieved and negotiate better pricing.
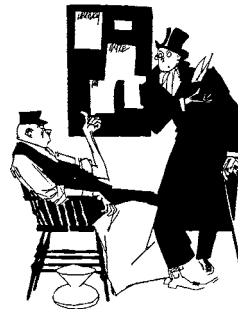
During her presentation, **Ms. Rogers** read paraphrased comments made to her or other librarians from different vendors. While some of the comments were shocking, we felt the meaning was lost without the full context; they were soundbites from a longer missing narrative, which could have included a vendor's perspective, or perhaps other relevant bits of the negotiating process. **Ms. Rogers** acknowledged that librarians also make mistakes, so it is difficult to generalize the motivations of the vendor community by a few examples. Along with positive intent, negotiations also require, as **Ms. Rogers** emphasized, respect. One of her criticisms was that a vendor was concerned that their negotiations would end up in a blog post. It seems naive to ignore a vendor's business considerations, especially when librarians are asking for more customized pricing options that may not be compatible with the publishers' internal business systems. How we negotiate with one vendor could be very different from how we negotiate with another vendor, depending on content, platform, cost, needs of our users, and so on. Another librarian might approach the same vendor from a different perspective based on different user needs and the content being negotiated.

Insisting on "everything in writing" and sharing one's opinion primarily through blog or twitter posts results in a monologue, not a dialogue. No one should be silenced for expressing their opinions through these media, but it is important to recognize that this is not conversation. Dialogues occur in various circumstances and most often require more than mail exchanges or other written documentation regarding negotiations. The best ideas frequently happen through conversation and are then co-opted into writing among the parties involved.

Examples of Successful Negotiations and Partnerships

All of us have worked throughout our careers to cultivate relationships with our vendors, and we can readily identify cases, such as those below, in which those strong connections have benefited our libraries and consortia.

- During a statewide budget crisis, a large public university was able to successfully negotiate with a major commercial STM publisher as well as a scholarly society known for its inflexible contracts. Over the years, all parties had developed good working relationships, and they were able to talk honestly and openly about the situation. Both publishers ultimately offered creative financing plans that in one case delayed anticipated price increases and in the other, actually reduced costs.

- In the first year of a three-year deal with a major STM publisher, a consortium renegotiated lower costs for years two and three (and effectively lowered the costs for the next three-year deal).

- On two occasions, one author of this article approached different vendors requesting semester-long trials to a database a faculty member needed. It was made clear that the products were too expensive for this particular library and that the trials would not result in sales. In both instances, the products were made available. The author had spent years cultivating strong relationships with both providers.

- Just a few days prior to the **Charleston Conference**, some of the authors were part of a meeting among dozens of publishers and librarians at which various ways of sustaining scholarly book publishing were discussed. There was disagreement (occasionally heated) about the means to do so, but there was clear agreement about the need to work together to create sustainable models.

- Several of the authors worked closely with two vendors on a successful demand-driven acquisitions (DDA) pilot project for a consortium with thirty-seven libraries. Early on, the consortium's eBook working group met with a variety of publishers and eBook providers to explain the consortium's needs. Through these discussions, a third-party content provider emerged as a strategic partner in developing the DDA program. Representatives from this vendor served as members of the initial task force and then the implementation team. This consortium now has the opportunity to influence current and future product development, and the vendor can point to this success in negotiations with other customers.

Domestic Abuse Analogy

We disavow **Ms. Rogers'** characterization of vendors as abusers and librarians as their victims. Leaving aside the counter-productiveness of such a statement, the analogy was inappropriate and offensive, especially to those in attendance (and there were a few) who had experienced, either directly or indirectly, domestic violence. Victims of such relationships are terrorized, and comparing that situation to a business transaction, however unpleasant, trivializes and demeans their experiences. Likewise, suggesting that publishers are akin to abusers is an irresponsible exaggeration, a response out of proportion to the matter at hand. In a follow-up tweet to one of this article's authors, **Ms. Rogers** said, "I find the whole thing deeply upsetting. Did I shock people? Good. We have to stop accepting terrible treatment. Didn't desire to cause anyone any personal pain. But I ask: Is my analogy incorrect? Am I wrong about how we're treated?" Yes, you are wrong. Disagreements with publishers over financial transactions or business models are in no way analogous to physical or mental abuse.

Conclusion

Ms. Rogers pleads for respect for librarians. She urges vendors to clearly articulate their pricing models. She promotes transparency in negotiations. Yet she tells us that she will not sit down for coffee with a publisher, asserts that written negotiations are mandatory, and compares her vendor partners to abusers. How does this build a culture of respect? How does this allow us to provide our patrons with the best resources possible? How does this strengthen our system of scholarly communication?

Above all, we should be working to build a culture of mutual respect, a point **Ms. Rogers** champions in the above-mentioned post by **Martha Heller** (*http://bit.ly/ILp8G7*). For that to happen, we need strong relationships between librarians and content providers and a shared understanding of our common goals. We agree with many of **Ms. Rogers'** underlying points. Yes, librarians should be advocates for themselves and their constituents and impress upon publishers the importance of fair and realistic pricing models. It is our view, however, that fostering a confrontational and adversarial approach undermines our collaborative efforts, misrepresents our long history of cooperation, and leads to failed outcomes that benefit neither the librarian, the provider, nor the researcher. 🦃