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Collaborative Experience: Cataloging Projects with Cassidy Cataloging

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When the Charleston School of Law opened in August of 2004, we signed an agreement with Cassidy Cataloguing to obtain the bibliographic records for its “CassidyCat’s Digital Law Library.” This was nothing different from what other libraries have been doing: obtaining bibliographic records with a link for free legal material on the Internet. However, our collection development plan emphasizing electronic resources and the preference for electronic books (monographs) demanded creative ways to provide access through our online library catalog. With limited staff resources and a large number of titles to add, we decided to contact Cassidy Cataloguing for a project.

Several small projects were contracted first, followed by the idea of asking Cassidy Cataloguing to create records for the monographs, or treatises, in Westlaw and Lexis. The idea had been also proposed to Cassidy by Rutgers University Law Library on the same day. Charleston School of Law’s request was for records with a deep link in the 856 field that would take patrons directly into the publication without the need for a second search once logged into Westlaw or Lexis. But the project was going to be a costly one for only one or two libraries.

Announcements sent through law director networking on the director’s online discussion list and technical services librarian networking on the Technical Services Special Interest Section online discussion list helped to raise the group of participating institutions to 17, and a cooperative project began after January 1, 2006. By mid-February, the number of participating libraries increased to the target of 22. With deep link information provided by the Charleston School of Law, the project was launched, and, after loading several batches of test records, the format and contents of the bibliographic records were ready to be distributed.

Collaboration from member libraries has been crucial as we identify problems with some of the records, publications no longer available for academic institutions, and new sets to be included and distributed. Technical services librarians also work

with Cassidy Cataloguing to keep the records up-to-date with cataloguing standards. As an example, two catalogers working at two different subscribing institutions routinely catch a handful of name authority updates that are missed when the new records are run against Library of Congress authority files. They forward their suggestions back to Cassidy, where records are checked, upgraded, and re-issued if necessary to all subscribers.

Keeping the lines of communication open in both directions has played a major role in the success of these cooperative efforts. Dialogue regarding the implementation of the new provider-neutral guidelines for e-monographs and the aggregator-neutral guidelines for e-journals was instrumental in the decision to create a second provider-neutral record set for the HeinOnline “World Trials Library” so that subscribers could choose the format they wanted.

Collaboration from the catalog record provider includes the willingness to customize records per the request of individual libraries and negotiation with content providers (publishers), if needed, for the rights to create the records. The request for customization could be very labor-intensive because it includes working with several batches of records, adding local notes or copy-specific statistical information for each institution requesting the customization. But the products were delivered on time and up to the standards of our requests.

The project has grown beyond just the records for the Westlaw and Lexis databases. Agreements have been signed to create MARC record sets with W.S. Hein for the HeinOnline Collections, WoltersKluwer for CCH and LoisLaw collections, and the Rocky Mountain Mineral Law Foundation.

A chronology of events and a brief description of the different projects and stages, provided by Cassidy Cataloguing, are as follow:

- **December 2005:** Cassidy Cataloguing is approached by two law school libraries, Charleston and Rutgers, to create MARC catalog records for the treatise titles in Lexis and Westlaw.
- **Mid-February 2006:** The number of participants rises to the target number of 22 libraries.
- **January – September 2006:** Cassidy created 1,926 original catalog records (1,601 Westlaw; 325 Lexis), and each school contributed \$2,000 to the project. Labor costs totaled \$65,500, which equals \$34.01 per catalog record. We received \$44,000 from the

initial 22 law schools, which only equals \$22.85 per catalog record. The remainder of the money to cover the initial cost of the project would have to come from the hope of future sales.

- **December 2006:** Thomson West introduces its MARC catalog records, created by another catalog record provider, to a few academic law libraries. Lack of interest leads to the records being withdrawn from the market for re-evaluation.
- **January 2007:** Monthly update service starts for subscribers to the Cassidy Cataloguing West-Lex E-Treatise Collection. Each month, records for new and updated titles are distributed.
- **February to May 2007:** Negotiation between Thomson West and Cassidy Cataloguing to discuss possibilities for upgrading Thomson West's MARC records results in an agreement whereby Cassidy would create MARC21 records for the Westlaw databases.
- **June 2007 – November 2009:** The number of law libraries subscribing to some portion of the West-Lex Project grows to 66. The project includes Westlaw primary sources, administrative reports, legislative histories, uniform laws, restatements, periodicals, newsletters, practice guides, CLE materials, and the Nutshell series. Cassidy has also created MARC21 records for the remainder of the

Lexis e-treatise collection, primary sources, periodicals, and newsletters.

- **March 2008:** Agreement is reached with W.S. Hein for HeinOnline "World Trials Library." Many other sections of the HeinOnline databases have been added to the agreement.
- **June 2008:** Agreement with WoltersKluwer for CCH libraries is signed.
- **July 2009:** Agreement with Rocky Mountain Mineral Law Foundation is signed.

What started as an idea for a customized set of records for two libraries with different requests turned into a project for 22 libraries. Today, there are close to 70 participating libraries in a much expanded project.

The original idea from individual libraries has developed into a larger one that has demonstrated how effective collaboration between catalog record providers and catalog record subscribers can be if each party is equally interested in service and the quality of a product. The project has also proved that outsourced cataloguing services work can deliver an excellent product, again through an effective collaboration between catalog record providers and subscribers.

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Vendor Pitfalls in Negotiating Large Multi-Year Contracts; or, How to Lose a Million Dollar Contract

This article was first published in a slightly different form on LLRX.com on June 21, 2009 at www.llrx.com/features/vendornegotiating.htm. Reprinted with permission.

Introduction

This article is dedicated to the many professional vendor representatives (VRs) that I've worked with over the years. These are the reps who showed up prepared to do business each time they visited. During contract negotiations they honored themselves, the companies they represented, and me by "bringing their A game" and being totally prepared to fully negotiate.

Many of the products they represent are sold by multi-year contracts and are negotiated at annual intervals. During negotiations, my goal is to control expenses and look for discounts (and still keep a quality product). The goals of the VRs include

obtaining or retaining our business and making a reasonable profit. When we—both firm and vendor—come to the table prepared to get the very best deal for our sides, everybody wins. However, if one of the parties arrives at the table ill-prepared, we both lose. The vendor will probably lose the business it could have obtained or retained, and the firm loses the chance to seriously consider the vendor in comparison to other vendors.

Below are comments on selected VR behaviors that I've witnessed over the years that substantially decreased the success of the VRs to obtain or retain our business. Hopefully these comments will serve as a guide to reaching a satisfactory conclusion to multi-year contract negotiations.

Ideas to Improve Contract Negotiations

Come prepared: Know your product. Know what you have to offer and then be able to describe what