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Information Outlook, September 2005

Special Libraries Association

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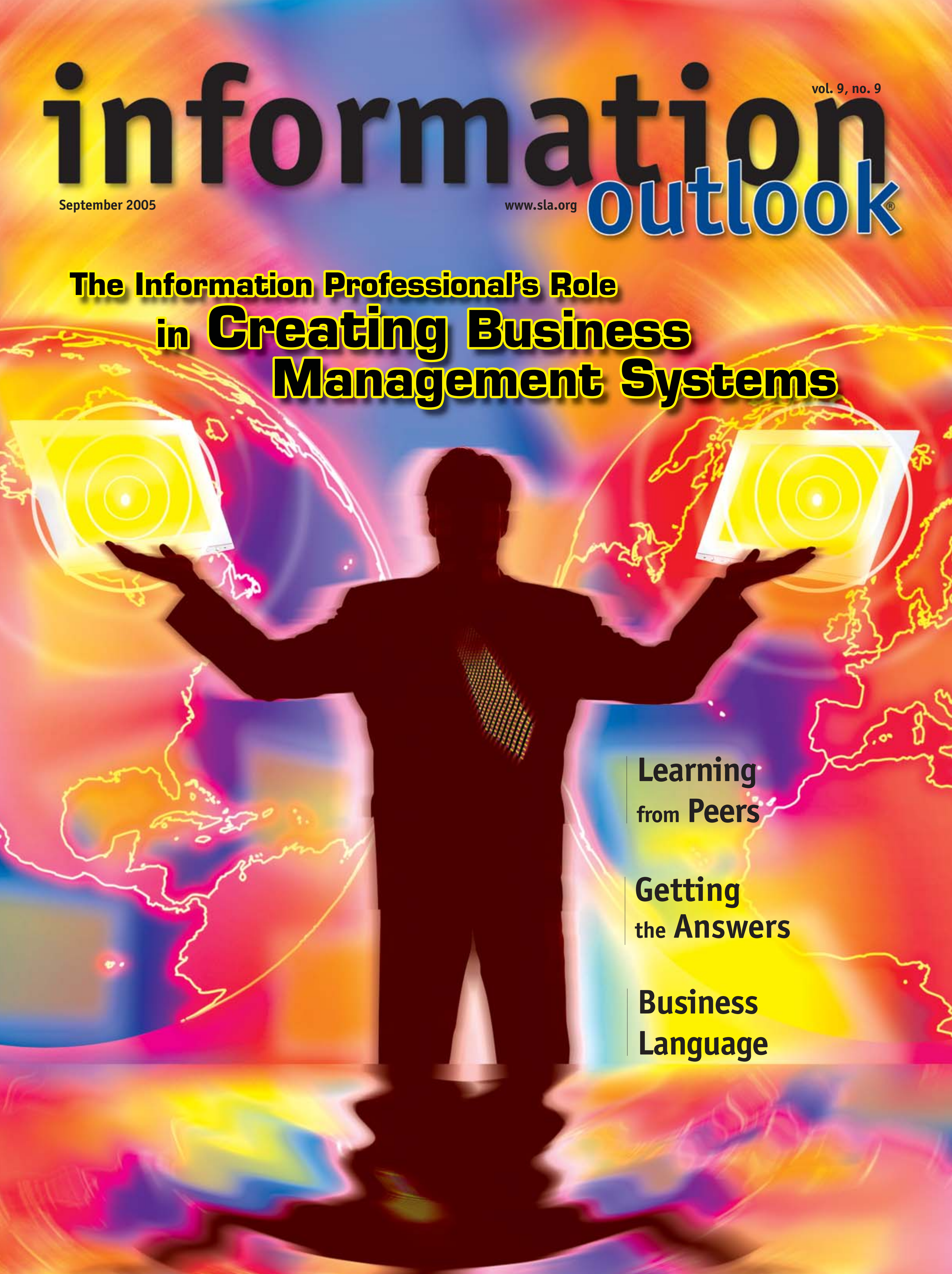

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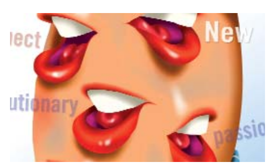

Columns and Departments

information outlook

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Vol. 9, No. 9
September 2005

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A To-Do List for September

Pam Rollo

No matter how busy I am during the summer, I always think of September as the "get-back-to-work" month. In honor of that work, I would like to thank all our colleagues who have agreed to either chair or serve on committees or on the task forces. (Task forces still have room for interested members.) I would like to congratulate all our new chapter and division leadership on assuming their new roles.

By the time you read this, division planners will have already submitted continuing education courses for review and approval and will be closing in on program commitments for the 2006 annual conference in Baltimore. The Leadership Summit task force is already in full swing organizing the Leadership Summit scheduled for January 18-21 in Houston, Texas.

Our slate of candidates for next year has been identified and will be reflecting on what they would like to contribute to the Association if elected. Staff are planning our first experience with electronic voting and—by the time you read this—will have provided the entire infrastructure for all of our conferences this up-coming year. Janice Lachance, our executive director, and many of our past presidents and leaders have attended IFLA representing SLA in the world forum of library associations. That's a lot to accomplish during the vacation season.

During this month, you will receive information on a proposed change to our bylaws and instructions on using the new electronic voting process. Voting will open September 15 and close on October 7.

This bylaws amendment removes the 12 percent cap on future dues increases and enables the SLA Board of Directors to implement a new dues schedule proposed by the Finance Committee and approved by the board.

The need to raise dues is a result of the same economic forces that already are affecting our personal and professional lives. The amendment would enable a two-tiered dues structure that would raise dues for most members—but would lower dues significantly for those who work part time, or are new to the profession, or are working in less affluent economies.

This proposed dues schedule is the result of suggestions made by members in a public forum at the Leadership Summit in Tampa and from our chapters, particularly the Kentucky Chapter. While increasing revenue for the association, the new schedule also will increase chapter and division allotments and relieve financial pressure on several categories of our members.

The last dues increase enacted by the association was in 1999. If approved, this new schedule would affect members renewing their membership as of January 1, 2006.

We're launching a special communication program on this initiative. By now, full details should be available on the SLA Web site. Information will also be available via fax and over the telephone. E-mail and voicemail boxes will permit members to leave comments and questions. Board and local leadership will provide answers to these questions.

In addition, there will be two live telephone forums where members will be able to ask questions of me and other members of the board.

I urge you to read all the information provided and to take advantage of the opportunities to ask questions about the proposed change.

I also urge to take advantage of this first opportunity to vote electronically.
Members who have supplied SLA with an e-mail address will automatically have the opportunity to use the electronic format. This new opportunity is a result of a bylaw change the membership approved at the conference in Toronto.

For those who cannot vote electronically, print ballots will be distributed. Ample time has been scheduled to enable the return of those ballots regardless of where they are mailed.

It's Your Message

My first column celebrated the impact that the annual conference made on many of us lucky enough to be able to attend. Now, I want to speak to making the most of your job, igniting your career and using your voice effectively in the organization. I am concentrating this year on defining the message of what we do and why it has value. That message must come from you.

As we all look forward to our first chapter programs coming out this fall, I would like to ask you to assume a new role in the association. The role is not new to you but the beneficiary may be: I would like you to gather intelligence on behalf of the association. Our colleagues who practice competitive intelligence and knowledge management will concur that the best source of intelligence for an organization comes from the field. In a corporation, product development can't succeed without observations from the sales force. If something interesting is happening in your place of work or in another association to which you belong, there are always ears in the association who would like to hear about it (particularly mine).

Last year, the Toronto Chapter asked me what I was most looking forward to during my term as president. One of the things I mentioned was my newly legitimate right to know about what our members were doing. (I am an information professional and, yes, I suffer from information envy. I just have to know.) If you and your team are doing something that you think is new, interesting, or downright super, then I want to know. I want everyone to know. I want the Public Relations and Research Committees to know, and I want the "Recognition" and the "Research Now" task forces to know.

I want to ensure that John Crosby, SLA's associate executive director, marketing and communications, and Karen Freeman, communications director, know. And remember that *Information Outlook* is always looking for articles on what you're doing. You can send a proposal to editor@sla.org.

As you get organized, start thinking about all the opportunities that the association offers. The Endowment Committee will be looking to award investment dollars for innovative ideas in our chapters and divisions. There will be scholarship awards at the chapter and division levels. There will be major recognition awards to be made by the close of the year. Feel the pressure?! Good! This is good pressure; this is the pressure of opportunity for our members.

We have several groups of people within the association who can contribute to your success this year: the first contributor is you, but in addition to you, we have your fellow members, chapter and division leaders, members of the board and our staff. All of our contributors are posted at www.sla.org.

The most important thing we can do in communicating our value is recognizing it in ourselves. Often, out of necessity, I have to write down everything that I eat. That list is usually frightening, but to cheer myself up, I write down everything that I do—and that list is empowering. It's your accomplishments that I want to communicate.

By now you should be feeling overwhelmed. But just look at what all that focus has done for you: You're energized! Good. Now get back to work this September. I'm relying on it.

web sites worth a click

By Cybèle Elaine Werts

Technical Assistance

No Child Left Behind

http://www.ed.gov/nclb/overview/intro/edpicks.jhtml?src=sm
The federal government's website about No Child Left Behind (NCLB) and what it means to you.

Office of Civil Rights

http://www.ed.gov/about/offices/list/ocr/index.html?src=mr
The mission of the Office for Civil Rights is to ensure equal access to education and to promote educational excellence throughout the nation through vigorous enforcement of civil rights. We serve student populations facing discrimination and the advocates and institutions promoting systemic solutions to civil rights problems. An important responsibility is resolving complaints of discrimination. Agency-initiated cases, typically called compliance reviews, permit OCR to target resources on compliance problems that appear particularly acute.

Americans with Disabilities Act

http://www.usdoj.gov/crt/ada/adahom1.htm
Obtain answers to general and technical questions about the ADA and to order technical assistance materials. View or download Department of Justice ADA regulations and technical assistance documents for businesses, and state and local governments including the ADA Standards for Accessible Design. View or download settlement agreements and consent decrees. The Department is authorized to certify building codes that meet or exceed the ADA Standards for Accessible Design.

Special Education

Council of Administrators in Special Education (CASE)

http://www.casecec.org/legislative.htm
The Council of Administrators of Special Education (CASE) is an international professional educational organization which is affiliated with the Council for Exceptional Children (CEC) whose members are dedicated to the enhancement of the worth, dignity, potential, and uniqueness of each individual in society.

news briefs

Survey Shows Web Users Flout Copyright Laws

A survey of 2,000 business information users shows that the Internet has led to a copyright infringement pandemic that is sweeping the globe.

Outsell Inc., a leading research and advisory firm for the information industry, found that approximately 56 billion documents are flung far and wide around the globe each year, many without proper authorization.

People are forwarding information to their peers from the open Web, publishing sites and corporate portals without a clear understanding of whether the forwarding is authorized.

Outsell analysts say that to respond, the information industry needs to unite and take action to harness this challenge, which is robbing them of significant revenues. Enterprises that are guilty for not adhering to copyright restrictions—wittingly or otherwise—risk being sued by companies whose information is wrongly shared.

In addition to surveying 2,000 end users of business information, Outsell conducted expert interviews and gleaned information from a database of information best practices to unearth statistics on common user behaviors and attitudes. In the new "Hot Topics report, The Global Copyright Pandemic: A First-Aid Kit for Publishers and Information Providers" they reveal that:

Eighty-nine percent of workplace information users forward content (articles, pictures, video, clips, etc.) to others. Their behavior is consistent regardless of their age, professional role, or company size. On average, users forward just under eight times each week, to an average of nine people each time.

Based on this percentage, Outsell estimates that 56 billion documents are e-mailed around the world each year—many without proper authorization.

Only about 10 percent of business information users feel uncomfortable sharing free information from the open Web or print sources. 60 percent feel it's just fine.

Fewer than 30 percent of information users believe their organizations obtain permissions in a timely manner. In a real-time, blazing-fast world where taking too much time to gather mission-critical information is a hindrance, asking permission is just another speed bump to them.

The Outsell report identifies three "hot zones" fueling the pandemic: publishers/aggregators, enterprises, and industry associations. It covers a variety of solutions, from transaction-based licensing to expanded micropayments, and suggests actions for information companies navigating copyrighting complexities.

For more information, see www.outsellinc.com.

news briefs

Texas Libraries Form Digital Group

The University of Texas Libraries, Texas A&M University Libraries, the University of Houston Libraries, Texas Tech University Libraries and Rice University Libraries, have entered into an agreement to establish the Texas Digital Library.

The Texas Digital Library seeks to assemble the combined technological advances and cultural and creative resources of the four major research university systems in Texas—Texas A&M University System, the University of Houston System, the Texas Tech University System and the University of Texas System. The resources of Rice University, Texas' other member of the Association of Research Libraries, will also contribute to the effort. While headquartered at the University of Texas Libraries at The University of Texas at Austin, the digital library will operate in cooperation with the campuses of all the university systems in Texas.

By leveraging the resources of these major research university systems, the Texas Digital Library is expected to offer a cost-effective venue for the assembly and delivery of information that will benefit a variety of communities, including K-12 students and their parents, university researchers, and the corporations doing business within the state and interacting with its institutions of higher education.

The Texas Digital Library Web site will be introduced later this year.

Martin Completes Term at IMLS

Robert S. Martin has completed his four-year term as director of the Institute of Museum and Library Services. During his tenure, IMLS has awarded 4,704 grants to America's museums and libraries totaling more than $899 million.

A librarian, archivist, educator, and administrator, Martin was professor and interim director of the School of Library and Information Studies at Texas Women's University prior to his appointment at IMLS. From 1995 to 1999, he was director and librarian of the Texas State Library and Archives Commission. He will return to work at the Denton campus of TWU on September 1, 2006, where he has been named to the Lillian Bradshaw Endowed Chair in Library Science.

Since Martin assumed the directorship of IMLS, the agency's budget has increased from $232 million to $281 million. In addition, in September 2003, President George W. Bush signed the Museum and Library Services Act of 2003 reauthorizing the agency through 2009. The legislation received bi-partisan support from Congress.

Under Martin's leadership, IMLS launched a new multi-million dollar grant program (more than $22 million in FY 2005) to recruit and educate the next generation of librarians. Since First Lady Laura Bush announced the president would support the recruitment initiative in 2002 to offset a looming national shortage of library professionals due to retirement, IMLS has funded 1,537 master's degree students, 119 doctoral students, 660 pre-professional students, and 378 continuing education students.

Martin also co-hosted with Mrs. Bush two White House conferences, one on school libraries and the other on libraries, museums, and lifelong learning.

IMLS has taken a leadership role under Martin's leadership in identifying best practices for the creation, management, and preservation of digital resources, and in disseminating these practices throughout the library, archives, and museum communities. Since 2000, IMLS has sponsored an annual Web-Wise conference to share the latest research and newest inventions in digital technology.

web sites worth a click

Council of Chief State School Officers

http://www.ccsso.org/
CCSSO, through leadership, advocacy, and service, assists chief state school officers and their organizations in achieving the vision of an American education system that enables all children to succeed in school, work, and life.

Council for Exceptional Children

http://capwiz.com/cek/issues/bills/
Public policy & legislative information.

National Association of State Directors of Special Education

http://www.nasdse.org/
NASDSE is dedicated to, and focused on, continuously improving educational services and outcomes while ensuring a balance of procedural guarantees for our children and youth with disabilities and their families.

National Council on Disability

http://www.ncd.gov/
NCD promotes policies, programs, practices, and procedures that guarantee equal opportunity for all people with disabilities, regardless of the nature or severity of the disability, and to empower them to achieve economic self-sufficiency, independent living, and inclusion and integration into all aspects of society.

Office of Special Education Programs

http://www.ed.gov/about/offices/list/osers/osep/policy.html
OSEP assists states with implementation of the Individuals with Disabilities Education Act (IDEA). As part of its mission, OSEP is charged with developing, communicating and disseminating federal policy on early intervention services to infants and toddlers with disabilities and on the provision of special education and related services for children with disabilities.

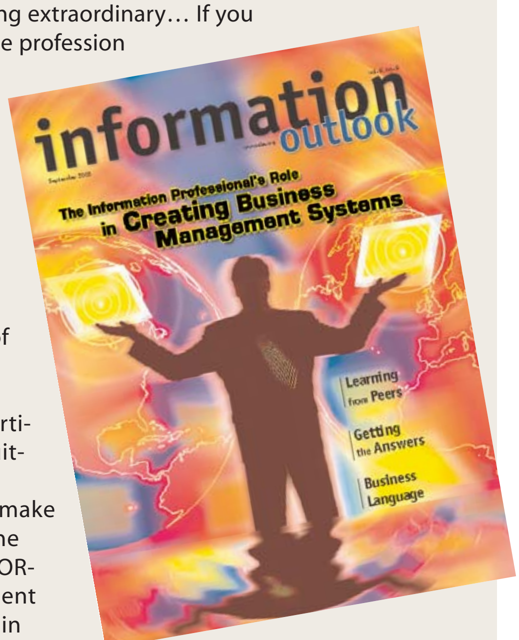
Cybèle Elaine Werts is an Information Specialist with the Northeast Regional Resource Center. NERRC is a part of Learning Innovations at WestEd, a research, development, and service education agency. She can be reached at cwerts@wested.org. The NERRC website is www.wested.org/nerrc/ and her personal website is www.supertechnogirl.com/.

How to Write for Information Outlook

SLA's monthly magazine is written primarily by and for information professionals. INFORMATION OUTLOOK interprets the news and covers trends and issues that affect information professionals in a global environment.

If you know of an interesting improvement in a special library or information center… If you've solved a difficult problem—or prevented one… If you or a colleague have done something extraordinary… If you want to give something back to the profession by sharing your experiences with others… We want to hear from you.

We welcome proposals for articles of interest to information professionals.



Topics

The editorial calendar is a guide for the editorial direction of the magazine. Each issue covers many more topics than those included in the calendar. "Cover article" topics for one issue will be suitable as features in another.

When you propose an article, make sure you can relate the topic to the specific needs of our readers. INFORMATION OUTLOOK readers represent companies of all sizes. They work in large libraries with large staffs and as solo librarians in small companies. Their experience ranges from senior professionals to beginners just out of school.

INFORMATION OUTLOOK readers want to read articles about new techniques, new ideas, new trends. They're interested in articles about search engines, knowledge management, international issues, copyright law, technology, innovation, the Internet. They're interested in articles on administration, organization, marketing, and operations.

INFORMATION OUTLOOK readers like case studies. They're interested in growing their organizations and in planning their careers. They want to know what works, and what doesn't work. They want success stories. They want to know how to confront problems and how to avoid them.

Articles should include something new, something different, something important. When the reader is finished, he or she should feel smarter than before.

A note to vendors and service providers

In many cases you may have the best and most current information on a topic. We invite you to share that expertise with our readers, to advance the body of knowledge of the profession. But—we'll insist that your articles do not promote your business or claim that your product or service is the only solution to a given problem.

Expanded writers guidelines are at www.sla.org/content/Shop/Information/writingforio/index.cfm.

To submit a proposal…

If you have an idea for an article, please send a proposal to jadams@sla.org outlining the article and your qualifications for writing it. A paragraph or two and a few bullet points will suffice.

We usually respond in a couple of weeks or less.

Editorial Calendar

Each issue of INFORMATION OUTLOOK includes articles on many more topics than the ones listed here. The calendar is only a general guide for editorial direction. "Cover article" topics for one issue will be suitable as features in another.

Please e-mail article queries and proposals to **jadams@sla.org**. If you are writing for a particular issue, your query should be early enough to allow for writing the article.

Issue	Cover Article	Deadline
December 2005	**Career development** Possible topics: Professional development, gaining expertise in content areas, résumé writing, interview tactics.	Oct. 7, 2005
January 2006	**Web searching** Possible topics: Meta directories, using online search engines, the best sites for various content areas.	Nov. 4, 2005
February 2006	**Managing** Possible topics: Planning, budgeting, supervising a staff, purchasing.	Dec. 2, 2005
March 2006	**Internal Marketing** Possible topics: Using intranets and e-mail, training internal clients, special events, tips for increasing usage, showing return on investment.	Jan. 6, 2006
April 2006	**Competitive intelligence** Possible topics: Ethical approaches, sources of information, analyzing information, adding value.	Feb. 3, 2006
May 2006	**Career development** Possible topics: Professional development, gaining expertise in content areas, résumé writing, interview tactics.	Mar. 3, 2006
June 2006	**Digital information sources** Possible topics: Selection process, RFP writing, maximizing usage.	Apr. 7, 2006
July 2006	**Managing** Possible topics: Planning, budgeting, supervising a staff, purchasing.	May 5, 2006
August 2006	**Knowledge management** Possible topics: KM systems, indexing information, low-budget KM.	June 9, 2006
September 2006	**Internal Marketing** Possible topics: Using intranets and e-mail, training internal clients, special events, tips for increasing usage, showing return on investment.	July 7, 2006
October 2006	**Web searching** Possible topics: Meta directories, using online search engines, the best sites for various content areas.	Aug. 11, 2006
November 2006	**Copyright** Possible topics: Global considerations, permissions, new laws and regulations	Sept. 8, 2006
December 2006	**Managing** Possible topics: Planning, budgeting, supervising a staff, purchasing.	Oct. 6, 2006

How to Create a Realistic Budget

By Debbie Schachter

In my first few years as a librarian, at the level of a supervisor but not as a manager, I didn't have any opportunity to develop skills in budgeting. I thought of budgeting as a mysterious skill by which you project and plan for the coming year's business expenses, accurately – as if the ability to foretell the future. I was reminded of my former thoughts when a friend came to me as a new treasurer for a small association wondering how to develop her organization's first budget. By then, I had had a number of years of experience in budgeting and financial management and I felt happy to pass on the simple guides that I follow.

Budgeting is not so much crystal ball work, but a careful analysis of past achievements and a realistic assessment of what your efforts of the coming year will result in. It is important to consider the micro- and the macro-environments to a certain degree, and be prepared to spend some time looking at current trends in expenses, revenues, and other external factors affecting library service. The strategic and operational plans must also be reflected in the budget to ensure your direction is as planned.

To begin, if you are not in a position to immediately develop budget and financial management skills, start by doing some reading, such as general texts on finance for non-financial managers. Then, try to develop your skills by taking on the role of treasurer for an association or a small non-profit board. This environment allows you to learn in a relatively stress-free manner, provided you are interested in learning and are detail oriented.

Your First Budget

Start by gathering all the information you can about the current and previous budgets. Examine the budget versus actual results information for several years to see what the management of budgets has been in the past. In your work environment, determine the budgeting philosophy, generally.

In libraries and non-profits, the expectation is usually to break even – to spend as much as you receive. The past theory for this type of budgeting has been to ensure that you show external funders that you require all of the money you receive or are donated, each year. More recent thought, however, is that most non-profits should retain some earnings (that is, to show a profit every few years) to develop a cushion for future funding crises. The profits from these years is put into a contingency fund, of sorts. This type of financial planning is now considered a financial best practice for non-profits. In years when you are not able to receiving enough funding to meet expenses, due to any number of extraordinary situations, you may end up projecting a deficit budget, and plan to use some of the reserve funds to ensure that financially, you meet all your commitments in the year.

Strategic planning and budgeting go hand-in-hand, as well. Strategic planning probably should be thought of first in the budgeting process. Strategic plans set the tone for a number of years (probably three to five years) and those who are doing the budgeting must ensure that those particular long-term projects or program developments are properly funded.

These items receive priority as they are essential for the organization's growth and development, and have been determined to be key to its success. Each year these items need to be reviewed in the context of the revenues and the projected expenses, overall, to ensure that they are properly represented in the budget. One example may be that staff development was identified in the strategic plans as essential to the library's continuing success.

If this is the case, the budget needs to show an increase in the expenses for staff development, to reflect the priorities approved in the library's strategic directions. Having budget estimates as part of the strategic plans, either as percentage or actual figures, is a good way to incorporate long-term planning into each year's operational plans.

Gathering Data

One of the difficulties for budgeting can be that you begin creating the next year's budget while your current year is still underway. Depending on how large or complex the budget, you may find you need more time to develop it that you originally anticipate. This probably depends on whether you are dealing with a few budget lines or whether you have a number of programs and/or departments and you require the input and planning from a number of different staff to help you to project effectively. You would probably start the process three to four months ahead of year-end. As you assess and project the actual results to current year-end, you will reconsider and reassess the budget plans for the coming year.

Your budget accuracy may be impacted by whether you

Debbie Schachter has a master's degree in library science and a master's degree in business administration. She is the associate executive director of the Jewish Family Service Agency in Vancouver, British Columbia, where she is responsible for financial management, human resources, database and IT systems, and grant application management. Schachter has more than 15 years' experience in management and supervision, technology planning and support, in a variety of nonprofit and for-profit settings. She can be reached at dschachter@jfsa.ca.

can obtain accurate projections from vendors on their anticipated price changes for the next year. For example, in our current organization, the budget year begins September 1st, while most vendors begin their year on January 1st. We will need to look at past data to extrapolate future increases, as we won't have notice yet from vendors, based on their new year's plans.

If you are budgeting for several departments and or programs, you will need to spend time with year program director to determine their projected needs and plans for the upcoming year. If all appropriate staff is involved in monitoring the monthly statements related to each of their budget lines throughout the year (both their expenses and revenue), they will be better able to provide accurate estimates for next year to you. If this information resides in fewer individuals, the best you can do is start with the directors/managers wish lists and compile those for the first overall impressions of the coming year.

Your next year's budget development will undoubtedly involve a number of iterations. You may end up negotiating with different staff or departments to make sure that the projects that are most important overall get the go-ahead for funding in every year. The "nice to have" items will have to come second place to the programs or budget lines that you don't have much control over.

For example, there are a number of lines that are fixed and will comprise the bulk of any service oriented organization. Staffing expenses in libraries and service organizations are the primary expenses, and this includes salaries plus benefits. Rent and other fixed overhead costs are another large item which often involve multi-year commitments, such as multi-year leases for property.

Equipment leases, such as computers, photocopies, etc., may also be multi-year leases, and so these figures are easily determined for the year's budget with little room to maneuver.

When you initially compile the entire set of estimates it may be a revelation to you where you spend money and where you need to save, or it may simply confirm what you had already suspected. The first draft budget lines will need to be adjusted as your projections to year-end provide more accurate indicators for next year's estimates. As each month passes to the end of the current year, make sure you note carefully the trends and adjust the draft budget until you are fairly certain of your estimates.

By basing your projections on a several previous years, you will be most likely to achieve realistic figures for each budget line. You will also get a sense of which lines require the closest monitoring based on their trends to overshoot estimates.

Overall, budgeting is a fairly simple process that requires careful thought and analysis. The integrated nature of budgeting and planning must be clearly understood by your library management in order to ensure your budget makes sense in the context of where you plan to be next year, then the year after. It is a reassurance that you are moving forward, as planned, and responding to changes in demand and in the library environment, as appropriate. It is a skill that you should try to develop, and one that helps to reveal a lot about the history of your library as well as plan its future.

The Information Professional's Role in Creating Business Management Systems

From time to time Information Outlook *will publish selected papers that were presented at the 2005 annual conference. This is one in the occasional series.*

By Rebecca Augustyniak, MLS; Amy Finley, MLS; Dawn Aguero, MLIS; Blair Monroe, MLIS; and Brian Arsenault, MLIS

"Although the core of the profession remains the same, the methods and tools for information delivery and the scope of the enterprise continue to grow and change dramatically. While maintaining their client- and content-centered approach, practitioners increasingly require advanced knowledge of information technology to realize their full potential. Continually emerging opportunities will propel the prepared professional into as yet unseen realms of advanced information retrieval, interpretation, synthesis, product development and virtual services on a global scale" (Abels et al., 2003).

In the new millennium, the ability to unify information and processes has caused a paradigm shift in information management, fueling an explosion in the business marketplace. Data that formerly were collected and managed within the confines of an management information systems (MIS) department now reside in Web-based management systems, where end-users and non-technical managers can directly access, create, modify, and implement them.

For years, information professionals (IPs) have created Web-based systems to collect, organize, and distribute information. The skills of the IP are transferable to a broad spectrum of new endeavors that unify people, content, processes, and systems. The paradigm shift has affected the role of the IP—the intellectual and technical skills previously used to create information systems can now be applied to building Web-based business management systems.

Here, we present historical and current perspectives on the IP's role and offer a case study to illustrate the use of IP competencies in building business management systems. We delineate design and development core processes, including team roles, and describe how an IP's knowledge and skills are used to develop a Web-based business management portal for the California Department of Health Services, Bureau of Local and Statewide Programs, Tobacco Control Section (TCS). We also discuss how the portal facilitates the client's ability to harness the distributed knowledge of its partners and put that knowledge to work in coordinated, systematic ways. We describe the ways in which the portal has increased efficiency and productivity.

How the Web Changed Everything

The debut of the World Wide Web changed the landscape of business processes and operations. Before the Web, the traditional role of the MIS professional was to collect, store, and output data for internal consumption. The traditional role of the IP working in an information center (IC) was to identify, collect, organize, synthesize, repackage, and distribute information for both internal and external consumption.

The two roles seldom overlapped in mission or responsibilities. Generally, neither department had a central interface to access data

Figure 1: Design and Development Core Processes

Core Process	Description
Information discovery and analysis	Identifying and analyzing current information sources (databases, publications, forms, etc.) and business processes. Determining additional information needs and business requirements.
Design	Translating the information collected during discovery and analysis into system requirements that include the following: • End-user roles • Business rules • Content requirements • Content management strategy • Form design • Web flow design • Reporting requirements • Data structure
Creative layout	Designing a mock-up of key pages to illustrate the look and feel of the system as well as its functionality and content.
Prototype	Developing a Web site that shows the design, flow, content, and functionality of the intended end product. Incorporating continuous client feedback based on initial design specifications.
Development	Creating databases, Web pages, code, scripts, and other components based on the approved prototype.
Quality assurance	Reviewing content for adherence to visual style and editorial standardization guidelines. Reviewing the functionality of appropriate tools to ensure that data are accessible and that the system is functioning appropriately. Performing usability testing.
Beta-testing	Testing of the developed system by the system manager and designated end-users to determine functionality and usability.
Revisions	Making modifications based on the feedback from beta-testers.
Implementation	Transitioning the system from a development environment to a live production environment ready for general end-user access.
Training	Teaching end-users how to most effectively navigate and use the system, and developing handbooks or manuals, as needed.
Evaluation	Collecting feedback from the community of end-users regarding usability, functionality, and content.

Figure 2: OTIS Development Team Roles and Responsibilities

Roles	Responsibilities
Project director*	Oversees all operational aspects of the project and the timely accomplishment of the project deliverables.
Project manager*	Handles the day-to-day management, planning, scheduling, a for the project. Communicates with the TCS project manager o basis to assess needs and expectations.
Web application engineering coordinator*	Meets with clients to assess business goals/requirements for W applications; performs systems analysis; designs, creates, mar documents change control process for any development effort develops, and implements the system.
Web application engineer*	Creates and manages databases based on the system design sc Develops code for the Web interface, including all back-end co provides help desk support to end-users.
Quality assurance coordinator*	Reviews content for adherence to visual style and editorial s guidelines. Reviews functionality of appropriate tools to ens are accessible and the system is functioning appropriately. (usability testing.
Information systems librarian*	Analyzes data for collection and organization. Develops conte strategies, including taxonomy control and controlled vocabu development. Documents data structure and business rules.
Visual designer	Creates the graphic images and visual style design for all Web system.
Network administrator	Designs, administers, and oversees the security of the networl including hardware, systems software, applications software, a computer-related configurations.
TCS project manager	Provides subject matter expertise on all facets of the busines processes. Coordinates teams of key stakeholders, communi soliciting feedback on decisions made about the design, dev implementation of the business management system.
End-user	Provides input and feedback about processes, usability, and of the system.

*FSU/CITES staff member with either an MLS or MLIS degree.

Figure 3: Core Processes by Role

Core Processes	Roles: Project Director	Project Manager	Web Application Engineering Coordinator	Web Application Engineer	Visual Designer	Quality Assurance Coordinator	Information Systems Librarian	Network Administrator	TCS Project Manager	End-user
Information discovery and analysis	•	•	•	•			•		•	•
Design	•	•	•	•		•	•	•	•	•
Creative layout	•	•	•		•				•	•
Prototype	•	•	•	•		•	•		•	•
Development			•	•						
Quality assurance	•	•				•				
Beta-testing									•	•
Revisions	•	•	•	•		•	•			
Implementation		•	•	•				•		
Training	•	•	•	•						
Evaluation									•	•

Figure 4: Summary of OTIS Business Management Portal

Overview

21 systems
244 database tables
200 forms
392 end-users
12 system roles
60 reports

End-user Roles

- Applicant
- Subcontractor
- Program consultant (PC)
- Contract manager (CM)
- Technical assistance consultant (TAC)
- Supervisor
- Tobacco Control Section (TCS)
- System administrator (SysAdmin)
- Procurement manager (PM)
- Peer reviewer (PR)
- Evaluator
- Contract Management Unit (CMU)

Systems

Planning, Collaboration, and Communication Systems

- Calendar (personal and global)
- Task Management (personal and county)
- Contact Directory
- Project Directory (OTIS/TCS sites)
- Evaluator Registry/Directory (OTIS/TCS sites)
- Help System
- Materials Development and TECC Intake
- Announcements (multitype)
- Communication (threaded)

Procurement Systems/User Roles

- Plan/Application Submission (applicant, subcontractor)
- Review and Scoring (internal/external; peer/TCS)
- Plan/Application Approval (PC, CM, TAC, supervisor)
- Plan Revisions (applicant)
- Augmentations (Renewal) (applicant, PC, CM)
- Progress Report Submission (applicant)
- Progress Report Approval (PC)
- Cost/Invoice Report Submission (applicant)
- Cost/Invoice Report Approval (CM)
- Procurement Management (PM)
- TCS System Administration (SysAdmin)
- Contract Management (CM, PC, TCS, applicant, supervisor, CMU)

Figure 5: OTIS Systems and Features That Support Shared Knowledge

Systems	Features	Shared Knowledge
Calendar	Personal and shared	Access to national, state, regional, and local event information
Task management	Personal and shared task assignment; status indicator	Access to tasks that are personal and shared within an agency
Contact directory	Master directory of agency contacts integrated with all other systems throughout portal that uses contact information	Access to contacts within an agency
Project directory	Uniform search interface	Access to all facets of funded project information
Contract management	Procurement and contract data tracking	Access by role to pertinent and real-time contract data and status
Evaluator registry/directory	Allows individual to register as potential evaluators; allows project applicants to select registered evaluators	Access to registered evaluators and their qualifications

.

and information; instead, data existed in separate silos without an enterprise search capability. The Web allowed the merger of business management and information management, thereby integrating systems and providing end-users with easy access to personal and shared information.

The traditional mission of an MIS department was to provide technology-oriented support to business endeavors. The MIS mission generally included the following:

- Supporting the goals of the organization.
- Collecting and storing large structured data sets.
- Building and maintaining reliable and secure systems.
- Providing data reports for internal customers to support decision making.
- Providing selective access to information (easily anticipated, well-defined reports).

Generally, MIS departments were responsible for collecting and storing large sets of structured data used in business processes. Some typical MIS functions were data system planning, design, and security; and information technology infrastructure management. The MIS department might have supported the following business processes: inventory control, finance, production, and marketing. Reporting needs tended to be straightforward and unchanging. Before the mid-1990s, ICs traditionally focused on information resources and services to support the end-user. The end product was geared to the individual consumer rather than to a business process. The IC mission reflected the organization's strategic goals and objectives, and generally included the following:

- Providing information resources and services to meet the demands and needs of stakeholders.
- Purchasing, acquiring, and providing access to materials and resources.
- Educating stakeholders, as needed, on the proper use of materials and information systems.
- Collecting, preserving, storing, and cataloging materials.
- Working with the IT department to provide database services.

Typically, an IC was responsible for collecting and storing both structured and unstructured information to support decision making and the acquisition of knowledge. Reporting needs were customized to the specifications of the end-user. Some typical IC functions were developing specialized collections of resources (both physical and digital); providing manual and online reference services; and developing information products such as resource guides, directories, best practices manuals, research digests, information analysis services, and information alert services.

Paradigm Shift

The personal computer revolutionized the way we live and, more important, the way we do business; and the same can be said of the Web. With the development of the hypertext transfer protocol (HTTP), it was possible to create browser applications. Through Web browsers, end-users could view data stored in various proprietary applications without having those applications on their own computers. For the first time, end-users had easy access to real-time business and global information in multiple formats. Conversely, organizations had unprecedented access to the end-users who could help them create and manage information.

Web applications provided the ability to access, acquire, create, revise, retrieve, and deliver data in real time via a Web browser—at any time from any place. The Web provided more powerful tools for information access and acquisition, searching, management, and delivery. It also provided access to information in formats not previously accessible through traditional online systems such as Dialog and LexisNexis. By using Web search engines, an end-user could mine voluminous resources residing on thousands of computers around the world with one simple query.

Universal access to the Web and its applications (e-mail, browsers, search engines, Web publishing, content management, etc.) gave organizations the ability to create business management systems that could integrate previously isolated information and processes. Silos of information and processes could be linked transparently.

This new world shifted the focus of MIS professionals from the collection and maintenance of data in proprietary applications and systems to end-users and their information needs. For IPs, the change brought about the removal of technical barriers, allowing IPs to bring their strong information management and end-user orientation to the data collection and distribution process at a more fundamental level. The IP role shifted from navigating the rooms someone else built to helping design a floor plan that better supports the ultimate purpose and goals of the residents (end-users).

Changing Roles

From the MIS perspective, the importance and priority of the end-user has increased dramatically. Gauche (1997) says, "The changes taking place in organizations today create in line management demands for information that are not met by the old paradigms." He goes on to say, "The new paradigm demands that we answer more difficult questions, such as 'What information does the user need,' 'How does he assimilate that information,' and 'How is the information recalled at the moment it can add value to the business process?' " Gauche says that the Web environment altered the MIS perspective from accumulation, storage, and retrieval of information to applying information based on the needs of the end-user.

From the IP perspective, the explosion of information and the interconnectedness of systems and processes increased the demand for the skills needed to manage information effectively and provided IPs with the opportunity to transfer their skills to new domains. Their experience in anticipating and assessing end-user needs and behaviors has placed them in a strategic position to play a key role in the design and development of business management systems.

Case Study: OTIS

The Florida State University (FSU) Center for Information, Training, and Evaluation Services (CITES) functions as an applied research and public service arm of the university. As part of FSU's research mission, the staff of information managers and Web application engineers is committed to using current applied research and remaining at the vanguard of the information industry.

FSU/CITES, under contract with the TCS, developed the California Online Tobacco Information System (OTIS) business management portal to provide real-time, user-centered information.

A portal is a Web site that provides a uniform interface with the ability to use a secure user name/password to access customizable content based on specific end-user interests and needs. A business management system incorporates and integrates all the components needed by an organization to complete critical tasks and meet and accomplish business objectives. The components may include financial, planning, reporting, customer service, marketing, and resource management. A business management portal integrates business systems with information-communication systems such as announcements, directories, and calendars.

The development of a business management portal for TCS stemmed from the need to more efficiently manage contracts with 61 local health departments and more than 100 competitive grants for providing tobacco use prevention/cessation activities and services locally and statewide. A unified, fully interactive Web-based system was required to efficiently manage the submission, approval, and progress/cost reporting of the various tobacco control plans in a cost-effective manner. The ability to produce aggregate reports of all project information to be used as a management tool by the TCS was also needed. The TCS staff identified the following benefits of such a system:

- Create a less burdensome mechanism for agencies/organizations to respond to requests for proposals.
- Improve the quality of submitted plans by creating a system that would guide the end-user in making the correct selection/entry based on previous selections.
- Streamline the approval process.
- Manage contracts more efficiently.
- Increase accountability (internally and externally).
- Coordinate tobacco control efforts.
- Identify programmatic gaps.
- Improve statewide evaluation of local program efforts.

Design and Development Core Processes

Designing and developing a successful business management system requires a team of subject matter experts, end-users, and information management and technology experts. Too often, systems are not successful because the end-user was not a primary team member in the design and development stage or the team focused on business processes instead of end-users. "Even the best designed information systems are not used if they are not aligned with the system users' motivations and commitment" (Malhotra and Galleta, 2004).

The design and development of business management systems generally include the following core processes: information discovery and analysis, design, creative layout, prototype, development, quality assurance, beta-testing, revisions, implementation, training, and evaluation. The core processes are defined in Figure 1.

Figure 6: SLA IP Competencies and OTIS Case Study Examples

SLA IP Competencies	OTIS Case Study Examples
Assesses, selects, and applies current and emerging information tools and creates information access and delivery solutions.	Assessed and selected software platform. Created customized application. Used software and hardware solutions to create a business management system for TCS.
Applies expertise in databases, indexing, metadata, and information analysis and synthesis to improve information retrieval and use in the organization.	Examined content life cycle of TCS paper-based system and translated it into a Web-based system. Designed and provided content management solutions to maximize information retrieval.
Manages the full life cycle of information from its creation or acquisition through its destruction. This includes organizing, categorizing, cataloguing, classifying, disseminating; creating, and managing taxonomies, intranet and extranet content, thesauri, and so on.	Provided TCS with a system to efficiently manage the life cycle of procurements, including creation, implementation, application, review, funding, reporting, and termination. Improved the quality and reporting of data through standardization.
Builds a dynamic collection of information resources based on a deep understanding of clients' information needs and their learning, work, and/or business processes.	Conducted an information discovery and analysis. Integrated disparate systems into a unified, centralized system accessible through a uniform interface customized to the end-user's role.
Demonstrates expert knowledge of the content and format of information resources, including the ability to critically evaluate, select, and filter them.	Developed a user-friendly interface for navigating, searching, and filtering complex data sets and generating reports.
Provides access to the best available externally published and internally created information resources and deploys content throughout the organization using a suite of information access tools.	Created unified systems that allow for content creation, management, and filtering (calendar, tasks, announcements, etc.).
Negotiates the purchase and licensing of needed information products and services.	Purchased required hardware and software for system development, implementation, and maintenance (development and live servers, Web development and server software, collaboration tools).
Develops information policies for the organization regarding externally published and internally created information resources and advises on the implementation of these policies.	Helped client evaluate and revise information rules and policies, and advised on implementation.
Develops and maintains a portfolio of cost-effective, client-valued information services that are aligned with the strategic directions of the organization and client groups.	N/A (For this project, all content is produced, maintained, and published internally.).
Conducts market research of the information behaviors and problems of current and potential client groups to identify concepts for new or enhanced information solutions for these groups. Transforms these concepts into customized information products and services.	Conducted survey of stakeholders to assess technical needs and capabilities, and developed system technical standards based on the results. Created a system for continuous feedback from stakeholders during design, development, and implementation of the system.
Researches, analyzes, and synthesizes information into accurate answers or actionable information for clients and ensures that clients have the tools or capabilities to immediately apply these.	Created a system that allows users to obtain real-time accurate answers and actionable information by viewing aggregate data. Assessed data integrity and use based on knowledge of information usability and recommended data strategies.
Protects the information privacy of clients and maintains awareness of, and responses to, new challenges to privacy.	Provided secure network. Designed secure system that ensures the privacy of data based on end-user roles.
Maintains awareness of emerging technologies that may not be currently relevant but may become relevant tools of future information resources, services, or applications.	Proposed next-generation solution that would incorporate OTIS as a portlet within an enterprise portal.

Development Team Roles

On the basis of its previous experience in Web-based system development, FSU/CITES won the contract to design and develop a business management system for TCS. As part of the management strategy, TCS was designated to provide subject matter expertise and was required to provide a team that would be available to meet with the FSU/CITES team on a frequent and regular basis. The TCS project manager was responsible for assembling a team of appropriate stakeholders and designated end-users. During the discovery, analysis, and prototyping processes, these teams met at least once a week; during development and implementation, meetings were generally held twice a month.

Figure 2 provides a description of the project roles and responsibilities of team members.

Figure 3 illustrates the roles of OTIS team members in each of the core processes.

Using the core processes, FSU/CITES was able to provide TCS with a state-of-the-art business management portal that is flexible and scalable, and that integrates 21 systems and supports 12 user roles. The OTIS portal provides end-users with one-stop access to all information and business processes related to tobacco procurements.

The portal provides hundreds of users with a single interface for accessing what were 12 disparate systems in several related silos, eliminating redundancy in information collection and management. The portal also provides the user with personal tools, such as a calendar. Most important, the portal is a shared system that gives its end-users real-time access to their own information and to other stakeholders' contacts, objectives, activities, materials, evaluators, and events. Before OTIS, the paper system did not facilitate aggregate reporting. Thanks to OTIS, for the first time, TCS can generate aggregate reports that permit timely strategic program planning and improvement. OTIS also accelerates and simplifies the procurement application and approval process.

Figure 4 provides a summary of the OTIS portal.

The following is a list of major advantages of a statewide initiative with a Web-based business management portal:

- Allows for the collection of uniform information.
- Promotes standardized data-collection methodology.
- Allows easier data entry and plan development.
- Facilitates timely feedback and approval.
- Improves coordination, collaboration, and accountability.
- Combines multiple forms into one online system.
- Streamlines and tracks plan/reporting approval process.
- Generates usable reports of individual and aggregate data.
- Identifies contractor training needs.
- Improves the ability to analyze program effectiveness.

Harnessing the Distributed Knowledge of Stakeholders

OTIS is an example of using technology to harness the distributed knowledge of stakeholders in an integrated, systematic way. It offers end-users consolidated and enhanced information, customized to their needs. With their long history of using cutting-edge technology to harness, consolidate, and package information for the needs of the end-user, IPs bring an essential perspective to building effective business management systems.

OTIS provides the client with the ability to integrate several processes via systems that are connected in the portal. These include the planning, collaboration, and communication tools listed in figure 5:

Applied IP Competencies

"An information professional (IP) strategically uses information in his/her job to advance the mission of the organization. The IP accomplishes this through the development, deployment, and management of information resources and services. The IP harnesses technology as a critical tool to accomplish goals. IPs include but are not limited to librarians, knowledge managers, chief information officers, Web developers, information brokers, and consultants" (Abels et al., 2003).

Figure 6 lists IP competencies published by the Special Libraries Association (Abels et al., 2003), along with examples of how the competencies were applied in creating the OTIS portal.

This article described the paradigm shift created by the advent of the Web and how it has allowed IPs to apply their knowledge and skills in new arenas. The case study demonstrated the IP roles in the creation of a business management portal that streamlined and standardized day-to-day business practices for the client.

IPs stand on the brink of new and emerging opportunities. By applying traditional skills and embracing leading-edge technologies, IPs are uniquely qualified to create and fulfill strategic roles to provide innovative information solutions.

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Amy Finley, MLS, information systems librarian

Dawn Aguero, MLIS, information manager

Blair Monroe, MLIS, coordinator, Web application engineering

Brian Arsenault, MLIS, Web application engineer

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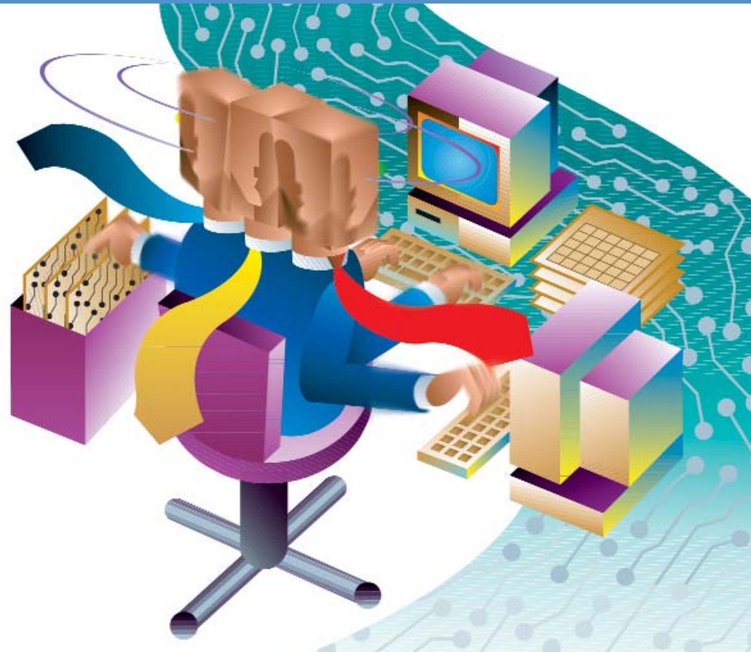
How Do We Serve Thee?

Let Us Count the Ways



Pat Viele is the physics and astronomy librarian at Cornell University. Here is a brief description of how she serves her clients.

Much of what a librarian does is not obvious to a casual observer. Some of our activities are traditional, others are adaptations of traditional activities to an electronic environment, and some are new. Here is a summary of services given by librarians.

We maintain libraries. The physical edifice needs constant care. We pay the bills, and arrange for roof repairs. In addition, we order materials appropriate for the collection, catalog them, arrange for license agreement for electronic resources and re-shelve items that have been used by our patrons.

Not quite so obvious are the "virtual" libraries. In the digital age, information has taken on tsunami proportions. Librarians search the Internet, evaluate Web sites, select and make available sites that contain reliable information. Examples include: the Librarians Index to the Internet (lii.org), the National Science Digital Library (NSDL.org), and the Internet Scout Report.

We answer questions. Reference questions are our bread and butter. Now that fewer people come to the library, we have adapted our reference service to include "chat ref" (real time interactive e-mail), regular e-mail, and staffing satellite reference stations either in an academic department or in an area with heavy foot traffic.

One example of this is the Research Connection at Duffield Hall, a new building on the engineering quad at Cornell. The satellite reference desk is located in the atrium near the food concession. The Research Connection is staffed by librarians equipped with a laptop computer and ethernet or wireless connections. http://www.englib.cornell.edu/rc/default.php

We provide information for education and amusement. Displays have long been part of a librarian's job. I prepared brief histories of the departments we serve. Some of my displays are also available online. http://www.library.cornell.edu/psl/information/displays.php

Newsletters are a convenient way of passing news and information along to our patrons. Our newsletter *Check Out!*, is also available online as well as in paper format. http://www.library.cornell.edu/psl/

We collaborate with faculty regarding classes. We teach for-credit classes on information sources in specific disciplines (for example, "Information Sources for the Physical Scientist"). We do instruction sessions tailored to the needs of a specific term paper assignment, and we find good Web sites for the class Web page. We also collaborate with faculty in designing specific assignments, for example, teaching Web site evaluation skills.

We give one-on-one instruction or instruct whole classes on the use of new resources.

We audit classes to keep in touch with the needs of faculty and students.

We constantly scan new information sources and send them to individuals for whom the sources would be of interest. For example, any new Web sites that I cull from the Librarians Index to the Internet or other indexes that have to do with music or acoustics, I send to faculty who teach the physics of music or the science of sound.

The Physics Graduate Society at Cornell maintains a Web page. Whenever I come across an item of interest to physics graduate students, I send it along to the society's Webmaster. Sites that I have sent include fellowship information, job opportunities, the AIP Style Guide online, and reports such as the Best Places to Work in Academia and the Best Places to Work in Government.

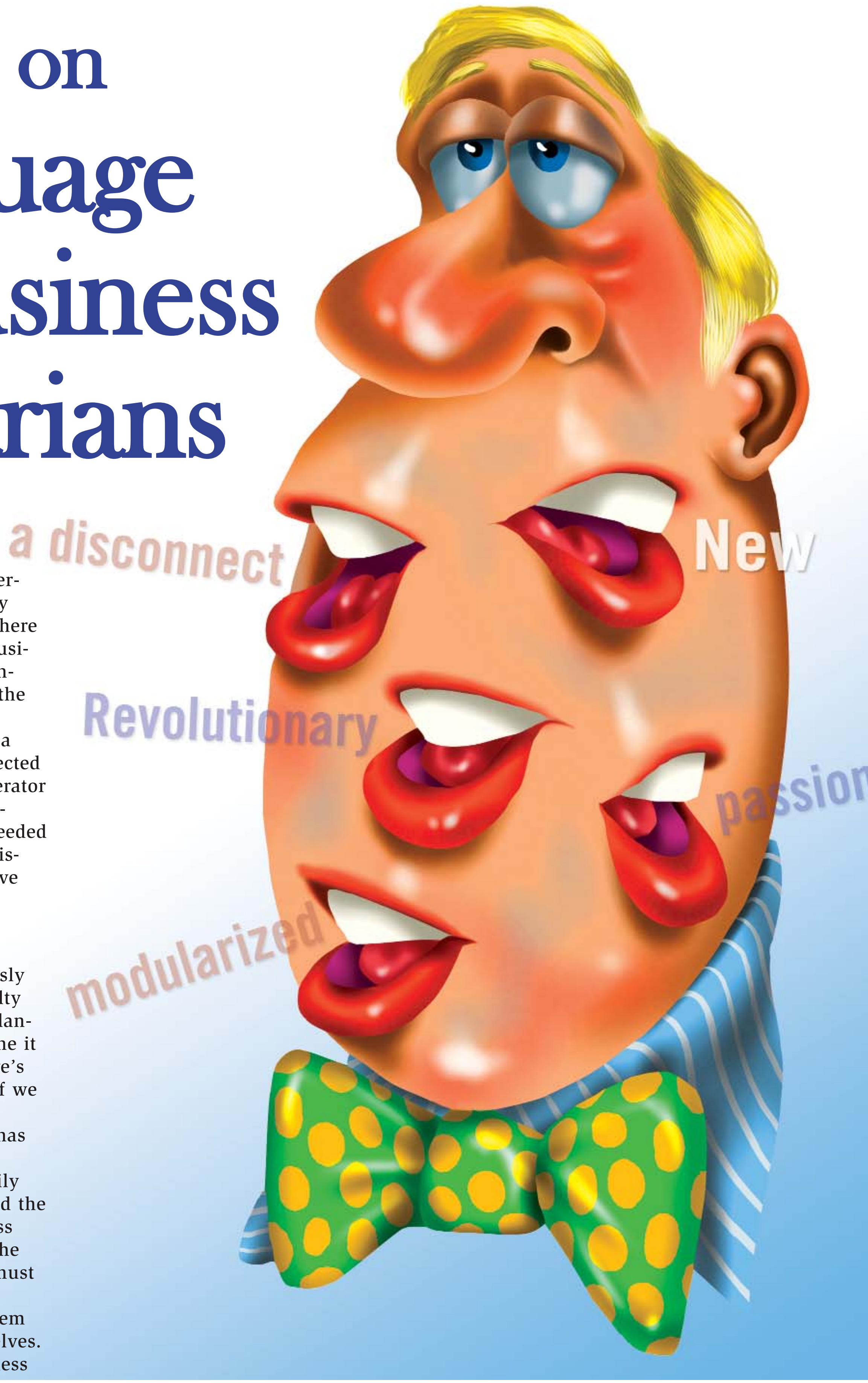
The undergraduate physics majors at Cornell have an active Society of Physics Students chapter. They invite me to talk about electronic resources at Cornell, and I attend talks given by others. Once a week, I send an interesting Web site to the SPS listserv. I call this service "Pat's Picks."

We sometimes join professional organizations outside of the library community. To better understand the research and teaching needs of physics faculty, I joined the American Association of Physics Teachers. I serve as a member of the Committee on Graduate Education in Physics and have also given poster sessions, contributed papers, and invited talks.

Following requests from AAPT attendees who have taken my tutorial "Mining the Internet," I have put materials into Cornell's D Space. "Tips for Evaluating Web Sites" is available at http://hdl.handle.net/1813/1485 and a "Sample Web Site Evaluation Form" is available at http://hdl.handle.net/1813/1486. A Web review based on my tutorial, "Mining the Internet" was published in *Physics Education* in January 2005 and I contribute to the Websights column in *The Physics Teacher*.

How will our services differ from their present form in 20 years? Since I don't have a crystal ball, I will simply have to continue to grow personally and professionally to meet the future challenges as they arrive.

A Note on Language for Business Librarians



By Surrell Handke

The misuse of language pervades all but the most literary strata of society, but it's nowhere more prevalent than in the business community. Business language has been poisoned by the use of jargon. The point was made clear to me recently at a seminar sponsored by a respected trade organization. The moderator told us that "Jargon is knowledge," and the speakers proceeded to use specialty terms inconsistently and with many objective errors.

Jargon

"Jargon" is defined variously as technical language, specialty language, misused technical language, and so on. If we define it as a misuse of language, there's no need to argue against it. If we define it as a specialized language, we can't deny that it has its place. Virtually every advanced discipline necessarily has a unique set of terms, and the various sectors of the business community have many. But the need for specialty language must not lead to its misuse.

Of course, there is a problem in defining the words themselves. Many words, including business

terms, are difficult to define. Some words can be trusted only in the context of a strictly defined discipline. The word "trade" has various meanings to the stockbroker, the consul, the unionist. The word "capital" means one thing to a financier, another to an economist. Its use in phrases is bewildering. To make matters worse, we lack a thorough, dependable business dictionary.

Sloppy Language

People use words with meanings that are only vaguely related to their definitions. They use verbs as if they were nouns ("a disconnect") and impress each other with participles (God help us, "modularized"). PowerPoint presentations and Web sites subject the innocent to the horrors of faulty parallelism. We endure constructions like this one:

"Choose one:
1. Sign up now
2. Reports
3. Easy"

Grammar exists for a reason, and sloppy language reflects sloppy thought.

Business writers often seem to assume that readers—or, for speakers, listeners—will know what they mean from the context. Of course, readers often do understand, but usually when they know what the writer means before they read the material. The danger here is obvious, and language is meant to do more than confirm our expectations. In the long run, the careless use of words makes for confusion and misunderstanding. Unclear definitions make for unclear passages.

Precision

It is the particular responsibility of the business librarian to demand the precise use of terms. We who deal with information per se must demand clarity on the micro level. This by no means goes without saying: When asked to identify the companies that comprise a market, how many of us would point out that companies comprise an industry? Customers comprise a market.

In another example, we might discriminate among the insider who owns more than 10 percent of the company's stock (let's call him the "owner insider"), the insider who is an officer or director of the corporation (I suggest "position insider"), and the insider who has access to nonpublic information (the "information insider").

Scatology

No one would pretend there's any excuse for the sexism, racism, homophobia, and scatology we find in business communications, especially speech. However, the perpetrators seem to think it's all acceptable, and they're hardly aware of what they're saying.

Accuracy

Our comrades in law libraries have always understood the importance of accuracy, but it's incumbent on business librarians as well to insist, for example, on the correct name of a corporation. Exxon Mobil Corp. is not Exxon USA or any of the other variations of the name. Even some of our tools—such as common proprietary databases—throw around company names willy-nilly, assuming that everyone will know to what they're referring.

We expect academia to lead in the area of disciplined terminology, and certainly business schools are more responsible than the corporate world in their lexicon. The danger is that as B-schools identify increasingly with the business community, they compromise their academic standards. They become symptomatic of the discipline rather than prescriptive, and fail to uphold the rigorous standards we find in the arts.

As for library schools, it's their nature to be meticulous. We should encourage them to apply the same discipline to courses related to business that they apply to cataloguing.

Intent to Mislead

The misuse of language in business is largely the result of intellectual laziness and poor education, but it's caused as well by a deliberate intent to mislead. Marketers consider it their job to stretch meaning to its limit, to their own advantage and within the letter of the law. The most obvious example is press releases announcing "new" and "revolutionary" products. No one thinks they're new and revolutionary, least of all the people who write that stuff.

This soft disinformation is so pervasive in business that we even use it among ourselves. We tell each other that a product is revolutionary to justify telling that to the public. And look at the condescending blather that HR departments turn out, referring to competencies as "leadership skills" and commitment as "passion."

Cuttlefish

In 1946, George Orwell wrote that ready-made phrases "will perform the important service of partially concealing your meaning even from yourself" (*Politics and the English Language*). He goes on to say, "In our time, political speech and writing are largely the defence of the indefensible." What would he say of the manipulative, self-serving drivel that's become the prose of business? The typical marketer writes, to apply Orwell's phrase, "like a cuttlefish squirting out ink."

We can't expect the library community to redress the evils of the world. But we do what we can. We suggest, we object, we clarify. In short, we resist. Business librarians straddle two worlds: the world of business and the higher realm of information science. We must include among our professional principles a commitment to further proper business terminology—discipline in usage and integrity in intent.

Surrell Handke, MBA, MSLIS, is a director of Business House Research (www.businesshouseresearch.com). He has worked extensively as a marketer, researcher, and writer. His work focuses on competitor intelligence and business statistics.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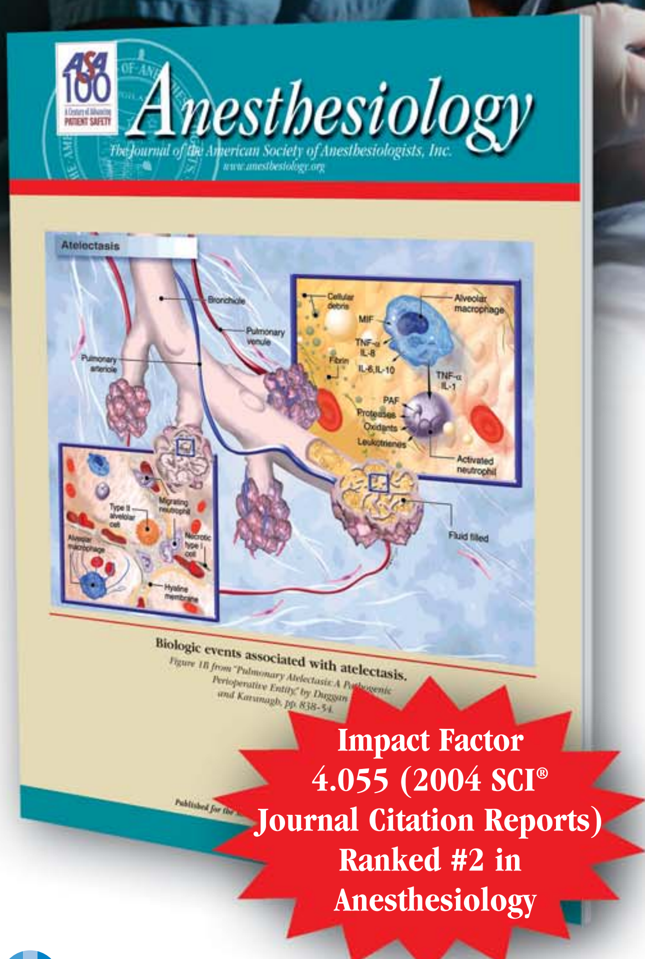
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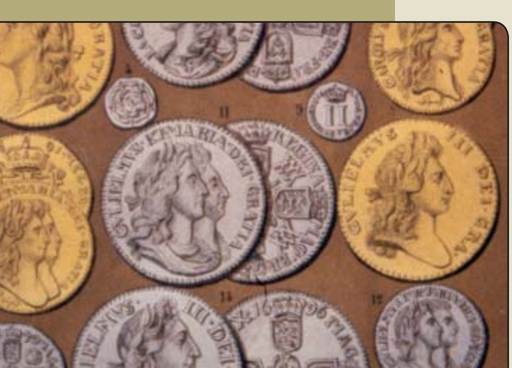

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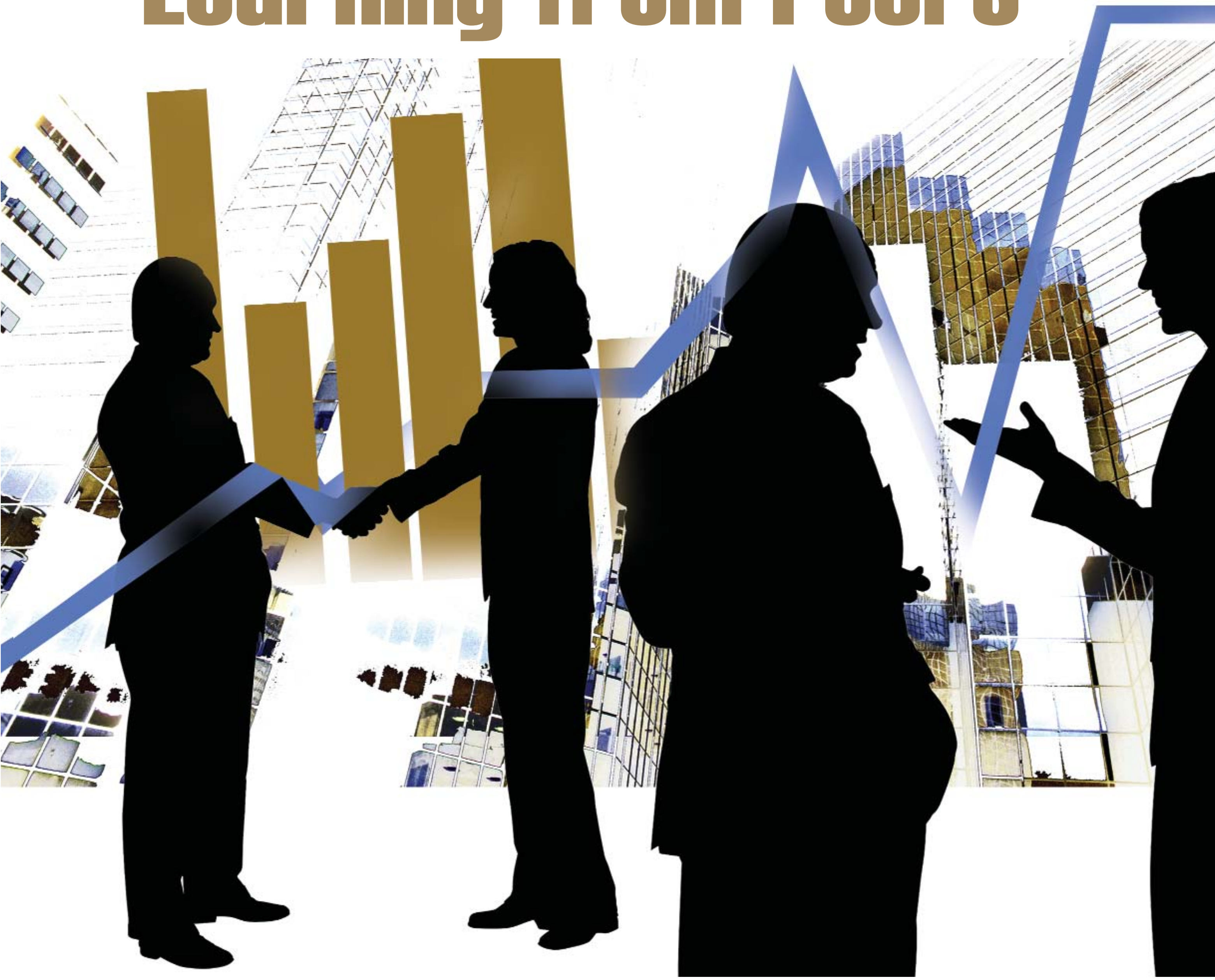

Benchmarking Your Information Management Activities

By Karen Wilson and Roger Strouse

Benchmarking is a process for comparing operations and strategies among peer groups. It allows participants to identify best practices, rationalize resources, and generally ensure that they are providing top value to their organizations relative to peers in other organizations or functions. Information managers, experiencing a period of rapid change and advancement, can use benchmarking to learn what their peers are doing with regard to staffing, service portfolios, globalization, portal development, marketing, and balancing virtual and traditional content, as well as to compare their budget and staffing levels with those of similar organizations.

In writing about APQC's (www.apqc.org) Open Standards Benchmarking Collaborative, Lee Simmons says, "Benchmarking has become synonymous with continuous improvement for best practice companies in today's global marketplace. How companies equate their business performance has increasingly come to depend on how they compare themselves to the competition. By matching up performance to relevant peer groups and world-class organizations, a company can target both what it does well and where it needs to improve." (March 8, 2005. Benchmarking's Value Added Case: OSBC Research Put to the Test. APQC.)

When done well, benchmarking projects can provide information for use in developing future strategies, honing processes, and influencing stakeholders. The insights gained can lead to change, improvement, and learning, which will in turn increase the value of information management (IM) to its parent organization.

Formal vs. Informal

While many think of benchmarking purely as a "project," it's also an ongoing process of continually looking outward. Benchmarking can be performed as part of a formal project, of course—and explicit benchmarking studies are the best way to gather comparative metrics or to look at a large, defined, representative sample—but it can also be integrated less formally into an information manager's everyday routine. Information professionals network heavily, and each interaction with a peer is an opportunity to benchmark.

The library community offers ample opportunities to participate in formal benchmarking studies. My organization, Outsell, Inc., recommends that information managers opt in to these formal projects when they are interested in comparing operational metrics, when they specifically want to examine practices within their own sector, or when they need to have a relatively large, representative sample of participants against which to benchmark.

To Learn More

Roger Strouse will present two online workshops in SLA's Virtual Seminar Series.
• Part I—The Principles of Conducting a Library Benchmarking Project, October 12
• Part II—Integrating Benchmark Findings Into the Information Product Development Lifecycle, October 26
Both are scheduled for 2:00 p.m. to 3:30 p.m.

Formal Benchmarking

Outsell suggests a six-step process for formal benchmarking studies. Formal benchmarking is usually performed when a service or solution has been established and the information manager is looking for ways to improve the value of the offering, operate more efficiently, and compare resources required with those of peer organizations. In product development life cycle lingo, this is when managers look at the "ongoing product performance" of their solutions and decide what, if any, changes to make.

The six steps of a benchmarking project are as follows:

1. Planning. This phase includes bringing stakeholders on board, designating a project leader, and establishing a budget.
2. Scoping and design. At this stage, final decisions are made about what information to gather during the research, and how to conduct the research.
3. Selection of benchmarking partners. This is when decisions are made about whom to include in the study's sample and what types of organizations will comprise the most meaningful comparison group.
4. Data collection. During this portion of the project, sometimes called "fielding," interviews or surveys are used to gather the information needed to answer the questions defined during the scoping and design phase.
5. Analyzing and reporting. This step encompasses examining the research findings, adding commentary and observations, and writing up the results in a way that makes sense for intended readers or recipients.
6. Action plan. At this final stage, the "so what" is articulated through a set of recommendations or action items that define how and when the benchmark findings will be used to alter, rationalize, or otherwise influence the information solution and ongoing strategy.

Planning the Study

The planning phase is critical because it creates the structure for a successful benchmarking study. This is the time to make sure all the ducks are in a row. Here are some of the key success factors in conducting a good study:

- Ensure that all stakeholders are on board. Communicate to those who have a stake in IM why a benchmarking study is important and how the findings will be used. Executives who will fund the study and who might eventually sign off on resulting actions are often the neglected stakeholders. Information management personnel are also important to the success of a benchmarking project, particularly because they can be of great help in defining specific needs, and because they will likely be affected by the changes that the study's findings drive.
- Assign a project manager who will be responsible for keeping the project moving according to the timeline. The project manager should have an excellent understanding of the needs of the internal organization, be skilled in project management, and have enough time to manage a large project.
- Select a senior manager to "sponsor" the project. While the project manager "manages down" to ensure that all project details are handled, the senior management sponsor "manages up" to champion the project with the senior ranks, work out funding issues, act as mentor for the project manager, ensure cooperation, and implement action items that result from the study.
- Set a budget for the study. The budget will drive subsequent decisions, such as whether to engage an outside firm to conduct all or part of the study, whether to include on-site visits as part of the data collection process, and even what internal costs, such as in-house labor or chargebacks for internal data processing, must be part of the project design equation.
- Think ahead about primary research support. If the

Do You Know SLA Members with Board Potential?

The Nominating Committee is looking for the next leaders of SLA. The committee will meet at the SLA Leadership Summit in Houston, January 19-21, 2006, to recommend a slate of nominees to the board for the 2008 association year.

Specifically, the Nominating Committee is directed to:

1. Seek recommendations for nominees from suitable sources in the association, especially from chapter officers and division officers.
2. Select a balanced slate of nominees for association officers and members of the Board of Directors, and upon their acceptance,
3. Present the slate to the Board of Directors.

To provide broad representation on the association board, the Nominating Committee invites members to nominate themselves or recommend colleagues who might serve in the following positions: president-elect, division cabinet chair-elect, chapter cabinet chair-elect and two directors.

Details about responsibilities for each of these positions can be found at: http://www.sla.org/content/SLA/governance/bodsection/descriptions.cfm.

To ensure SLA continues to be relevant and influential in the information- and knowledge-based 21st century, it is critical for the board to be composed of diverse, enthusiastic, and visionary individuals committed to the profession. Members who have been active and successful contributors to chapters, divisions or association-level committees are needed as candidates.

There are many SLA members in the organization who can fill this need, although members of the current Nominating Committee may not know some of them. Therefore, you are invited to submit names, including your own name if you are interested in being considered.

The committee is looking for 10 people, two candidates for each of the five positions, for 2008.

Please forward the following information for people you think are ready and willing to serve the profession as SLA board members:

- Nominee's name, address, phone number.
- Identify the position recommended for each individual you name.
- Length of SLA membership.
- Offices held in Chapters, Divisions, or at the association level.
- Membership in association-level Committees.
- Other activities with SLA (on chapter and division committees, teaching CE courses, awards received, articles published, etc.).

Include other information the committee should know. For example, what it is about this person that makes them a great nominee for the election slate? It would also be helpful if you can provide any other relevant comments that distinguish this individual among your colleagues.

Recommendations may be sent to any of the following persons by January 13, 2006:

Spring 2007 Election Chair

Wilda Newman (2004-2006)
wildanewman@yahoo.com
Knowledge Resources Associates, LLC
5964 Rosinante Run
Columbia, MD 21045-3826
USA

Committee Members

Richard Geiger, Chair-Elect
rgeiger@sfchronicle.com

Andrew Berner
aberner@universityclubny.org

Liz Blankson-Hemans
liz.blankson-hemans@thomson.com

Marcia J. Rodney
mrodney@ball.com

Staff Committee Member

Linda Broussard
lbroussard@sla.org

Leaders, take the first step. Name yourself or identify others that you know are ready for the next step in their professional careers. Give back to SLA and identify those leaders that you know are waiting in the wings to take on these rewarding and fun leadership roles. Do you see a leader? Tell us about him or her!

Serving on the SLA Board of Directors is guaranteed to be a challenging and rewarding experience. It will provide an opportunity to expand management and leadership abilities through service in an international professional association. Please give some serious thought to who might bring fresh ideas and energy to the board and send us your recommendations. All information submitted will be handled confidentially.

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study is to be conducted using in-house resources, make sure to engage specialized help in programming online surveys and statistical analysis. If the organization is large enough to offer all these resources in-house, involve them early in the planning process. If using an outside firm to conduct all or part of the study, look for one that has experience with both benchmarking and information management.

Karen Wilson is a research director at Outsell, Inc. She is responsible for Outsell's benchmarking research as well as for directing custom research projects. Karen holds an MLS degree from the University of Toronto. Contact her at kwilson@outsellinc.com.

Roger Strouse is vice president and lead analyst for Outsell, Inc. He is responsible for both syndicated and custom research projects, including benchmarking and user needs assessment research. Roger holds an MSLIS degree from the University of Illinois. Contact him at rstrouse@outsellinc.com.

Scope and Design

Once the internal benchmarking team is assembled and the management of the project is established, the next step is deciding on the study's scope and design. During this phase, the team brainstorms, articulates, refines the scope and overall objectives, and designs the instruments (surveys, interview guides) for collecting data. It is important to allow sufficient time for this phase—getting the survey right is a critical success factor and should not be rushed. The project manager, working in conjunction with the benchmarking team and the project sponsor, must walk the fine line of ensuring that all truly necessary questions are included without causing the study to grow too lengthy or to exceed its intended scope.

Brainstorm, then categorize the questions you want the study to address. Some benchmarking studies focus on just one aspect of the business; for example, reference services, portal strategy and content, or resourcing issues. As food for thought, review your strategic plans, user needs studies, and current and planned metrics. Talk to senior managers and executives to understand what they'd like to learn from the study. Also, solicit input from client-facing staff when appropriate. Is a new process or service under consideration? Would it be beneficial to discover how peers are handling particular challenges?

Consider the explicit scope of the project, and then consider how each question in the proposed benchmarking study specifically supports a decision to be made. There is no room in a questionnaire to ask questions merely out of curiosity. Ask only questions that will provide responses to support a specific decision.

The following are the topics most often covered in IM benchmarking questionnaires:

- Organizational structures
- Mission
- Reporting relationships
- Target markets and user data
- Staffing
- Marketing
- IT support
- Service portfolio
- Content management activities
- Portals and intranets
- Performance metrics
- Strategic planning and marketing
- Budgets and funding mechanisms
- Contract terms and vendor issues
- Demographics of respondents

Benchmarking studies can answer questions such as these:

- How do my FTE-to-user or budget-to-user ratios compare with those of my competitors?
- What new virtual services are being offered?
- How are metrics being used to articulate value?
- What relationships and agreements do IM functions have with vendors?
- How are global organizations evolving and managing their communication processes?

Of course, this is an incomplete list. Figure out what answers are needed relative to the scope and drivers of the benchmarking project, then create questions that will yield actionable results.

Benchmarking Partners

Successful benchmarking studies depend on choosing appropriate organizations for comparison. If the benchmark sample is too dissimilar, there is a risk of trying to compare apples and oranges. The characteristics that make benchmark participants similar, however, may depend on the intent of the study.

The most common way to choose benchmarking partners is by demographic attributes, such as size (employees, revenues, student body, etc.), sector, geographic location, or other quantitative characteristics. These selection criteria work well for broad, wide-ranging studies that don't have a particular focus.

Alternatively, benchmarking studies with a more defined purpose may benefit from creating a sample based on subjective qualities, such as perceived success, degree of advancement toward operating virtually, or similar drivers (recent corporate events such as a merger, for example). Partners may also be chosen based on a particular operating model, such as zero-budget funding, single-person libraries, or heavy use of outsourcing, if the purpose of the study is to explore a specific topic in depth.

Once the scope of the project is clearly defined, it's time to approach potential partners. In Outsell's experience, involving from six to 12 participants will yield the best results while still keeping the project manageable. Prospective organizations will participate only if they feel they will benefit from the study, so set up the project as a "win-win" for all involved, and market it as such. Negotiate up front what each partner will give and what it will get. Will all participants receive the same report upon completion? How much input will participants have into the research design? If you plan to use an outside firm to run the study, will all participants share the costs?

Ensure that all partners are willing to participate fully. The study's value will be limited if too many respondents give "don't know" or "decline to answer" responses to sensitive questions. Stress confidentiality and anonymity of individual responses, and ensure that the report will not link specific respondents to their answers.

Collecting data

The careful design and scoping work done in advance, and the forethought given to selecting partners, will pay off mightily during the data collection phase of a benchmarking project. Targeted benchmarking studies generally consist of both quantitative and qualitative components. All study participants will likely want some degree of input into the data collection instruments, so you should expect some negotiation with benchmarking partners before finalizing surveys and interview guides.

Quantitative data, such as metrics, are gathered in a survey format. Surveys ask a standard set of questions and are not robustly interactive (there is no interviewer to ask follow-up questions, delve deeper into a particular response, or further explain a question). They work best for getting answers to discrete questions where there is little room for interpretation by the respondent, and they provide numerical data that typically answer such questions as "How much?" "How often?" or "How many?" The results of quantitative research can be easily counted, categorized, and compared.

Outsell always uses Web-based survey mechanisms for capturing quantitative data. These surveys are easy for respondents to access, don't involve paper shuffling, and automatically capture responses for analysis. They also allow for programming in "skip patterns" that mask questions that might be irrelevant to some respondents based on previous answers. Many organizations already have survey software in-house that IM can use to host survey data, but open Web survey tools, such as SurveyMonkey (http://www.surveymonkey.com) or Zoomerang (http://info.zoomerang.com), are also available and easy to use.

The other half of the equation is qualitative research, usually conducted as an interview. Open-ended qualitative questions allow the respondent to give creative answers. The respondent can enter into a conversation with the interviewer, and the interviewer has license to pursue extemporaneous topics that arise during the interview. Best practices and other high-value feedback often emerge from the qualitative portion of a benchmarking study, providing a view of the results that quantitative data alone cannot.

Since both the quantitative and qualitative portions of the data collection process are working toward answering the same questions, the interview guide will often cover many of the same issues as the survey, using open-ended rather than closed-ended questions. Interviews are a good format for fleshing out the data gathered during the survey, asking more questions that begin with "why" or "how."

Benchmark interviewing is an art, so it may pay off to hire someone experienced in this kind of research. Also, participants may be more open in their responses to sensitive information if the interviewer is an objective third party, not a competitor. Outsell's experience tells us that benchmarking interviews average about 90 minutes in length, but they may be shorter if the study is highly focused on a particular topic.

If budget permits and you need to see an operation or service in action, you may wish to hold your interviews during a site visit.

Reporting and Analysis

Before the data can be analyzed, the study results must be reported using tables, charts, and narrative. The data must be presented in a "blinded" fashion so that no answer can be traced back to an individual respondent. When particular data are broken out by individual respondents, obviously the respondents will not be identified, but instead will be labeled as "Company A," "Company B," and so forth. Outsell recommends shuffling the order in which respondent-by-respondent breakouts are presented to further protect participants' anonymity.

Once the data are tabulated and organized, the quantitative and qualitative results are analyzed. The purpose is to arrive at observations and conclusions that in turn lead to recommended action items. The analysis can include both explanation (summary and description) and interpretation (opinions or speculation) of the findings.

Analysis of quantitative data usually includes statements that begin with, "Over half of respondents reported that…" or "Only one participant indicated that…." The analysis should be quantitative, explaining how many (or what percentage of) respondents gave a particular response, so that readers will understand the weight of each response compared to the weight of others. It can focus on most popular and least popular responses for comparative purposes.

Analysis of qualitative feedback works a little differently. Here, the goal is to highlight interesting or valuable responses, but not necessarily to rank them among other responses. Analysis of qualitative feedback usually includes statements that begin with, "One interesting approach is to…," or "Two participants brought up a unique solution to the challenge of…." Qualitative feedback can also be used to explain unexpected quantitative findings: "Although we expected to see more use of contractors, we learned during interviews that many respondents…."

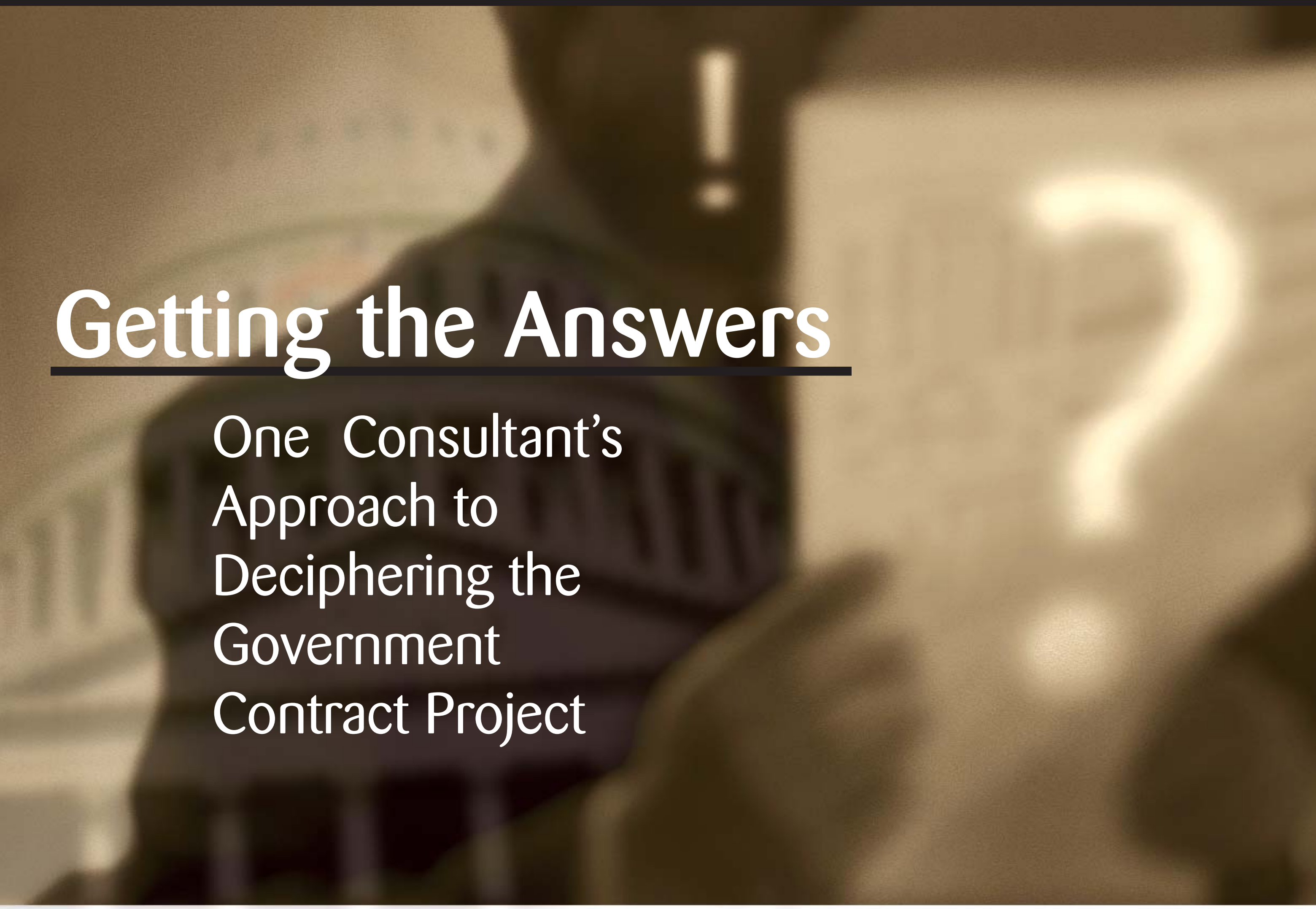
Action Plans

The journey through the benchmarking project is nearly complete, but perhaps the most important task of all remains: formulating an action plan to respond to what was learned from the study. Objectives and intended lessons were articulated in the early stages of the project, during scoping and design. Now is the time to revisit the initial questions and drivers, look at how the study's findings relate to them, and commit to what the IM function is going to do in response.

The nature of the action plan depends on the initial intent of participating in the benchmark study. As part of developing the action plan, the project manager will revisit the study's drivers and then ask, for example, "What best practices came to light that I want to integrate into my own operation?" "How am I going to respond to the fact that my IM function serves as many users as others but with only two-thirds of the budget?" "Do I need to revisit my service portfolio now that I realize it's so different from IM functions at my competitors?" "I am already far ahead of the benchmark group in converting to a digital environment—should I shift resources to other initiatives?"

The action plan is where the rubber meets the road—the whole purpose of participating in a benchmarking project is to uncover opportunities for improvement. Without a specific action plan that delineates the next steps to be taken in response to the study's findings, all the effort would be for naught. Assuming that the scoping activity completed at the beginning of the project was well thought-out, it should not be too difficult to identify action items at the end.

To stay relevant in today's fast-paced world, it is imperative that all IM functions continuously examine their strategies, products, services, and processes to ensure that they are delivering maximum value to users and to the organization as a whole. As you sit at your desk planning how to improve your information function, you can be sure that someone in a similar operation, sitting at a similar desk, is confronted with the same types of challenges. Maybe the problems you are struggling with today are the ones they solved six months ago. Why not learn from each other through a benchmarking study? You will save time and effort, and increase the competitive advantage you already bring to your organization.



Getting the Answers

One Consultant's Approach to Deciphering the Government Contract Project

By Lorette S.J. Weldon

Through my five years of government contracting, I have learned that projects may be advertised, but they do not necessarily exist. Usually the client needs a contractor to "flesh out" an idea into a developed project. The idea can be as small as a basic file system for a specific department or as large as a document management system for a whole agency.

I have found the following five steps helpful in breaking down the idea into a workable project on which you and the client can work together successfully: the requirements analysis, the comparative analysis, the features and cost analysis, the performance analysis, and hands-on performance.

Requirements Analysis

Ideally, the first step is to interview everyone who will be using the solution that you develop in this project. The "real-life" situation is that the client will have you talk to whomever the client deems worthy of discussing the project with you. The number one goal is to get the main client to answer the Four W's:

1. What are the things that need to be done and/or the standards involved in this organization?
2. Who will be the players or users in this project and solution?
3. Where do you want this project implemented?
4. When do you need the idea to be developed into the solution?

In one project I worked on, the client wanted an easier way to organize, update, maintain, and edit documents. The client introduced this project as helping the whole agency with all of the documents it generated each fiscal year. This sounded overwhelming but challenging. I looked forward to talking to the directors of the various departments about what they wanted in such a system, but the client

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made it clear that I was to talk only to the client and reflect only the client's ideas in the project.

What developed was a document management system for the client's needs, not the agency's needs as reflected in the standards of the agency's intranet. The client's needs were based on advertised reasons for buying Xerox's DocuShare 4.0 document management system: "It's easy," "It's cost effective," "It's flexible," "It's scalable and extensible," and "It's secure" (www.xerox.com/downloads/usa/en/f/FILE_PROD_DocuShare_Brochure.pdf).

Comparative Analysis

The second step is the comparative analysis of the available solutions. For example, when dealing with document management systems, request information from the main vendors, whether in the form of a brochure or white paper by the vendors, as well as getting information through journal reviews and soliciting it from organizations using the products.

If you have nowhere else to start in getting information on document management systems, you can Google it. Searching on Infotrac's magazine databases is another good approach. In my project, I gathered information from both small vendors and large ones, such as Xerox. I started with vendors that had been in business for at least ten years. Getting their business background also helped me to decide which vendors seemed stable. This step will give you many products—in fact, more than you need. To narrow down the products, you will need the third step.

Features and Cost Analysis

This step is to actually state the features of the various products and see if they match the client's needs. In this step, I went back to the five reasons that Xerox proposed for buying the DocuShare product and compared them with what the client really wanted: "It's easy" (the client wanted to be able to install and work it without any IT knowledge), "It's cost effective" (the cost had to be below $20,000), "It's flexible" (it had to operate within the operating standards of the client's intranet), "It's scalable and extensible" (the basic unit had to cover work flow and routing assignments, version control, and search interface), "It's secure" (groups of documents or single documents had to have different permission levels).

The cost can be difficult to nail down with different vendors. Some vendors want to customize their product to fit your needs, so they will refuse to give you a quote until you give them a definite system design. Through this step, I narrowed down my list of potential products to 16.

Performance Analysis

The fourth step is interviewing organizations that use the products. E-mail interviews are usually the best because clients find print more credible than verbal quotes. I have also found that people can change their thoughts if you do not have them in writing. Giving interviewees a list of the needs you obtained from steps 1 and 2 will help them point out the good and bad experiences that they have had with the product. This information will help you with the next step. It also helps to narrow down the products again. After this step, I narrowed down my list of potential products to five.

Hands-on Performance

The fifth step allows you to evaluate the products in a specifically designed test environment based on the work flow process that may have been defined in the first step. If they were not defined there, the second step will have pointed to the specific functions that the client wants the product to perform.

Within the realm of document management systems, you must then specify whether the test will include a full trial version or a canned version. Xerox's DocuShare has a full trial version. This means that everything you would buy in the basic software is what you get for a certain testing period. Xerox will give you either a 30-day or a 60-day trial license, depending on your testing needs. Because of office bureaucracy, I needed the 60-day trial license extended an additional 60 days. Other vendors will give you the actual product and charge you for the software if you do not update them on your progress in evaluating their product. They may also set a non-negotiable time limit.

Canned versions consist of an online demonstration of the product. This is not an option in most government agencies because the vendor could gain access to the agency's computer systems. Security is a major concern in government contracting. A canned demonstration may also be available on a CD. Canned versions do not allow the freedom to explore how the product can work for your client. They are usually too general.

The fifth step also gets to the specifics of the format of the trial product. I have found that there are three types of trial products among document management systems: hybrids, onsite vendors, and offsite vendors. The hybrids have the program on a CD, but the database for the metadata is housed at the vendor's location, or you are given a Web address where you can log in to the document management system and connect it to a database on your site.

For security reasons, this is not an option when dealing with the federal government. The onsite vendors allow online access and testing at their location. Again, this usually is not an option. Offsite vendors usually offer the preferred format. You get the product on a CD and can test it as you see fit. Through the hands-on performance step, Xerox DocuShare showed that it is easy to use, although you do need some familiarity with information technology and may require the help of the client's IT department to understand installation functions and protocols.

These five steps can help you decipher the project and develop a solution in most government contract positions. Keep in mind that no project is a straightforward operation. Flexibility and creativity are the key to getting to the heart of the project so that you can offer your client the best solution.

coming events

September 2005

9th European Conference on Research and Advanced Technology for Digital Libraries (ECDL 2005)
September 18-23
Vienna, Austria
http://www.ecdl2005.org

Your Career: A Straight Shot or a Shot in the Dark?
September 21
http://www.sla.org/virtualseminar

InfoX Conferences
Information Today
September 27-28
New York, NY, USA
http://www.infox-ny.com/

SARC III: Experience a Timeless Information Journey: Revolution and Evolution Continue
September 28
Williamsburg, VA, USA
http://www.sla.org/conf/ conf_sar

2005 LITA National Forum
September 30-October 2, 2005
San Jose, CA, USA
http://www.ala.org/ala/lita

October 2005

EUSIDIC Annual Conference
European Association of Information Services
October 9-11
Innsbruck, Austria
http://www.eusidic.org

Internet Librarian International 2005
Information Today
October 10-11
London, UK
http://www.internet-librarian.com

Part 1: The Principles of Conducting a Library Benchmarking Project
October 12
http://www.sla.org/virtualseminar

3rd International Evidence Based Librarianship Conference
Australian Library and Information Association (ALIA)
October 16-19
Brisbane, Australia
http://conferences.alia.org.au/ebl2005

Internet Librarian 2005
Information Today
October 24-26
Monterey, CA, USA
http://www.infotoday.com/il2005

Part 2: Integrating Benchmark Findings Into the Information Product Development Lifecycle
October 26
http://www.sla.org/virtualseminar

ASIS&T 2005 Annual Meeting
October 28-November 2
Charlotte, NC, USA
http://www.asis.org/Conferences

November 2005

Part I: Unlocking Knowledge from Text
November 15
http://www.sla.org/virtualseminar

KMWorld & Intranets 2005
Information Today
November 15-17
San Jose, CA, USA
http://www.kmworld.com/kmw05

Part II: Case Studies and Implemention Roadmap
November 29
http://www.sla.org/virtualseminar

December 2005

Copyright for the Corporate Librarian: The Importance & Consequences of Copyright Issues in the Digital Environment
December 7
http://www.sla.org/virtualseminar

Communicating the Value of Your Service
December 14
http://www.sla.org/virtualseminar

January 2006

SLA Leadership Summit
January 18-21
http://www.sla.org/

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Your Organization's Role in Copyright Education

By Lesley Ellen Harris

Libraries in organizations of all sizes are often the department responsible for obtaining copyright permissions and providing information about current copyright laws. An increasing role of libraries, and a role that can only help in your work as "copyright administrators," is copyright education—educating various people and departments in your organization about the basics of copyright laws, compliance with copyright laws and with any copyright policies followed by your organization, proper clearance procedures, and legal use of licensed content.

Sensitizing Others

Your first job on library copyright duty is to ensure that the library is not labeled as the "bad guy," but rather as an important part of the management and administration of your organization, which includes copyright compliance. You did not create the laws—you are just trying to educate others so that your organization is complying with these laws.

Creativity will be necessary as you work to obtain support from employees within your organization. For example, you may find it helpful to implement techniques such as lunchtime discussions on copyright, communication opportunities between copyright owners and licensees within your workplace, an internal discussion list on copyright, an electronic newsletter on copyright, and in-person and online courses.

Obtaining Copyright Law Information

Information about copyright law may and should come from a variety of print and online resources. Available print publications include books targeted to lawyers, to specialized audiences, as well as to non-experts.

Electronically, there are many Web sites and discussion groups on the Internet which are invaluable sources of information and which have been highlighted to you throughout this course. Additionally, Internet-based or Internet-delivered courses and guides are useful and offer flexibility in educating members of your organization. Examples of online sources are listed at the end of this column.

You will have to regularly refer to these kinds of resources for reference and for updates, such as court cases and changes to copyright legislation which might influence the use of copyright-protected materials in your organization. The legal sections of many general news Web sites, as well as Web sites specific to legal topics, follow current copyright cases.

Learning from Seminars

Seminars on copyright laws in general, and ones for specific groups like librarians, academics, management and publishers, are increasingly available. It is useful for you and other employees to attend as many as is feasible and to absorb as much as possible. Not only are seminars good sources of current information, they are an excellent resource for getting your specific questions answered from experts and from colleagues, and for sharing your copyright frustrations with colleagues in similar situations.

Online seminars on copyright law and licensing are also becoming more popular and may be a less expensive, less time-consuming way to keep informed.

Adding Resources

In addition to having a written copyright policy specific to your organization, you should consider building a small library of copyright resources. To help your colleagues understand the laws, regularly circulate new books on copyright and newsletter issues or articles to all appropriate people in your organization. Also, if there is a relevant seminar which you cannot attend, try to obtain the course materials to add to your copyright reference shelf.

Your organization's employees are also a resource. Consider setting up a discussion group to meet regularly to discuss copyright issues in your workplace. Attendees can share their frustrations or challenges in dealing with copyright issues and see how others have resolved them. You might even consider a guest speaker—a copyright lawyer or a person from a rights and permissions department of a publishing house, for instance, to further enlighten you about copyright issues. Another interesting "guest speaker" may be someone from one of your vendors who negotiates licenses to online content.

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Ongoing Work

Whether copyright laws change, your organization's use of content changes, copyright education is an ongoing work, and it's best to take the time now to start implementing some ways of both sensitizing members of your organization about the importance of managing copyright issues, and teaching them about the intricacies of this complicated area of the law.

SLA's Click University now offers a number of online courses on copyright and licensing, ranging from –three to nine weeks and six to 27 e-lessons. See: http://www.sla.org/content/learn/clicku.cfm.
Lib-license is one of the best Web sites on licensing issues for libraries. See: http://www.library.yale.edu/~llicense/.

A helpful Web site is the U.S. Copyright Office's site, http://www.copyright.gov/, which contains circulars and fact sheets covering many copyright law issues.
The Web site of the Canadian Intellectual Property Office ("CIPO") offers useful information on Canadian copyright law. See: http://cipo.gc.ca/.

The Copyright, New Media & E-Commerce Legal News (http://collection.nlc-bnc.ca/100/201/300/copyright/index.html), is a free resource for current copyright information and developments. Send an e-mail to lehletter@copyrightlaws.com to subscribe to this e-letter.

Tips to Boost Innovation for You and Your Library: Part 2

By Stephen Abram

In the August issue of *Information Outlook* I wrote my first 11 tips for innovation and product development success at your library as a sort of ode to the 25th anniversary of my MLS graduation. This is part two of a three-part series. Watch for the final batch in October.

1. Get out of your box!

It is unlikely that you match the alpha user profile. I know that as a librarian, I am limited in my ability to connect with the challenges faced by newbie library, Web, or database searchers. I'm not saying that I can't overcome this limitation, but I have to be aware that my training, biases, and experiences have changed my perceptions of the information world. When I am designing services for seniors, kids, teens, challenged communities, the differently abled, or even other professionals such as lawyers or engineers, I need to be aware of and prioritize their needs and competencies over my own. It pays to remind myself that I am not trying to create products and services for mini-librarians.

I need to understand the users' context and needs and not project my own onto them. For instance, the end user probably doesn't want "information" but, more likely, wants to be informed, entertained, taught, or transformed in some manner. Libraries are great environments for achieving those goals.

2. "Productize."

Be able to physically point at your product or service. It's a problem that so many library products and services are intangible. Until we can name them and point to them as if they were tangible services or products, they will be undervalued and underappreciated by our users. It will also be difficult for our supporters to articulate what makes their library experience transformational. For instance, branding your service and tying your brand name and institution to the brand is essential. Look at how much more successful library intranets and Web sites are when they are associated with a strong branding program and marketing plan. I love the creative branding some special libraries have put on their catalogs and Web sites. Also, notice how much more articulate we are about our traditional services when a new element arrives. For example, we describe traditional reference work much better now that virtual reference and instant messaging reference services have been introduced. The new elements focused the mind on what value was being delivered and the individual strengths of face-to-face and virtual reference services. The Amazon.com book suggestion features challenged reader advisory services to stretch, and the impact of Google on professional database searching needs no illustration.

3. You can't step in the same river twice.

This is ancient wisdom. It means, in our context, that we are blind to both the pitfalls and the potential of new information or technology developments. I remember when AltaVista was first introduced—many colleagues said that this couldn't be the future of searching. After all, it had no fields, no true Boolean, and it didn't allow the use of set searching! Then along came relevancy ranking driven by the search engine's algorithm—again pooh-poohed by my colleagues (and me for a while). Now we have Google Scholar, and I hear the same refrain. This time I'm not so sure. After all, Google Scholar is still in its infancy. Can you point to someone's baby and complain that she's a lousy accountant? Keep yourself open to the movement of the river—it's always changing, and the river is strong. In the battle of the river and the rock, the river wins. Just look deep into the Grand Canyon to see the power of steady progress. Today we must invent a future for libraries in a world of users who are changed in their perception of information use and the role of technology.

4. Remember FABs.

Understand the differences between features, functions, and benefits. It's easy to design hundreds of features and functions into a product or service. The true skill is in understanding the benefit of each. Who is deriving the benefit—the

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end user? The administration? The intermediary? The vendor? Knowing who derives the ultimate benefit helps you decide who needs your product or service. If it doesn't meet someone's true need, then question whether it's worthwhile. It should meet the needs of your priority target user. Then you must market and sell the benefit—not the features and functions—to your users. Imagine marketing an ATM as a set of buttons that tells you your bank balance, instead of as a convenience!

5. Don't assume—test.

You may believe that you understand your clients. You may have been a customer or "normal" user in the past. You may think that you know what the user will do in nearly every situation. Don't believe it. There is nothing more humbling than discovering the infinite variety of user paths, behaviors, and thinking patterns in the real world. It's a bowl of gourmet jellybeans out there, with a few M&M's thrown in for good measure! Chant this mantra—I will test my assumptions, I will test my assumptions. It's better to be humbled in your beta test or pilot than to be embarrassed in the marketplace.

6. Observe.

Don't just ask your clients what they do, will do, or want. OBSERVE them. It has been my observation that users can't, won't, or don't tell you what they are really doing online or on the Web. When I watch them, I see all sorts of interesting behaviors. Some theorists claim that lack of retrospective coherence (or the ability to make sense of something after the fact) causes this contradiction. Also, most users can't imagine how much better something might be. They simply want to satisfy a need, and they get frustrated when there are barriers to that satisfaction. By watching their real behaviors (and sometimes using keystroke trackers or cams), we can see where that frustration occurs and can start to think more creatively about ways to improve that Web site or search experience.

7. Have a vision and dream BIG!

Sirsi's tagline is "How will you shape the future?" This tagline represents thinking deep in Sirsi's DNA. We try to be future focused. We know that we can't build the future without our clients' ideas and energy. I find our tagline to be one of the most motivational things in our workplace, and our CEO, Pat Sommers, quotes it often. I have seen the power of vision everywhere I've worked. When a shared vision is absent, the workplace is missing something and verges on the horrible. When it is present, we achieve great things. When the vision doesn't have enough stretch in it, things seem mediocre. Think back to great work environments or great leaders you've known and you'll usually find a common element—some great and compelling visions. Those who don't dream big and have a vision are doomed to an endless repetition of the present. I hope they love the way things are.

8. Ask the three magic questions:

- What keeps you awake at night?
- If you could solve only one problem at work, what would it be?
- If you could change one thing and one thing only, what would it be?

I have discovered that these questions are truly magic. They start conversations with users rather than eliciting simple answers. Because they are open-ended, they're better than yes-or-no questions. Just set the context and ask away. I have used these questions of primary school kids, titans of industry like Bill Gates, librarians, IT managers, and cabinet ministers. These questions work every time to delve deeply into our users' needs and personal goals. When we are armed with that knowledge. our libraries become unstoppable.

9. Never underestimate the customer.

Our customers (users, clients, learners, et al.) come with an infinite range of skills and abilities. While we may strive for simple, we must avoid being simplistic. Never aim to please the lowest common denominator. That strategy ensures that you'll displease the widest range of users. For example, some love the Google interface, with loads of white space. It is clean and spare. It also forces users to go elsewhere for the information density and deeper information they need. The most popular Web sites among our users (e.g., CNN, CBC News World, USA Today) are deftly dense, and people survive fine. Users have demonstrated an amazing elasticity to adopt complex solutions to their information and life problems. We can't force too much on them at once, but we shouldn't ascribe this learning curve to an inability to adapt—it just takes time. Sirsi's portal solutions take advantage of our users' ability to handle a great deal of information on a screen to provide more context and content at the same time. The public is ready for more density.

10. Seek the real customer.

This is harder than it sounds. There are always important stakeholders in any product. For example, a simple Web site for students can involve teachers, administrators, IT folks, librarians, content creators, parents, curriculum developers, and, just by the way, the kids. Whose needs absolutely must be met and whose needs take second place? It's a hard question, and I've seen development teams have serious debates arguing for one focus over another. Make sure you meet the needs of the real end user. Many a product has failed by meeting the needs of the wrong population. Ask yourself a simple question for each feature and function: Who cares? (For example, If I add DRM to this product, who cares? The end user? Administrators? The content provider? Hmmm.)

11. Respect diversity.

There's an enormous amount of diversity out there, and it is not just traditional diversity around income, gender, sexual orientation, race, culture, ethnicity, or language. Of particular interest to information professionals is diversity of information literacy skills, learning styles, and multiple intelligences. There is a significant body of research in the education and library sciences about understanding persons, not just technology! I have found that studying the works of Bloom, Gardner, and Piaget in the fields of learning and intelligence pays off richly in better understanding of user behaviors.

Supplier Directory

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The 3 Ms Have It

By John R. Latham

Every July I attend a symposium for a local university's library school students, which comprises a panel of about 15 industry colleagues who recount their career histories, make a few recommendations, and answer the students' questions.

As is my wont, I tell them as I see it, and raise a few eyebrows in the process. This year I was approached by a student who wondered whether I ever got into trouble saying things in the way I do, which she thought others might consider rude. I explained that being forthright and honest was not the same as being rude, although there may well be people nowadays who consider that to be the case. This made me think about what I considered to be rude behavior, especially within the context in which we work.

I was brought up in the early 1950s in Britain on a surfeit of "manners maketh man" and "you must never drop your standards, because you can never pick them up." And don't ever tell me that you forget that stuff, as only recently in the 98 degrees, 70 percent humidity of Washington, D.C., I bought a bottle of chilled water, but before I started to drink the water in the street, I looked upwards seeking my mother's approval on the grounds that it was never 98 degrees in England.

It was surely better to be seen drinking in public than inconveniencing someone to call an ambulance because I had passed out on the street. That was another of mother's maxims based on never letting your actions inconvenience someone else. You have to think about how your actions are going to affect others, and to do this requires putting yourself in their shoes. Mother also told me to "think before I spoke," but I never mastered that.

These rules, maxims, standards of behavior, or whatever you want to call them are particularly relevant in our current business environment, and never more so than in the use of e-mail.

It is rude not to respond to an e-mail within 24 hours. Even if you cannot answer the question without more research, have the courtesy to acknowledge receipt of the e-mail, and explain that you will respond later. If you do not do so, you are inconveniencing the sender of the e-mail, as he or she has to waste time wondering if you have received the message, and whether he or she needs to ask someone else. It is all about communication and good customer service. Put yourself in the receiver's shoes.

It is rude to make personal criticisms or comments about someone in an e-mail, especially if sent to a list. There may have been extenuating circumstances why something did not happen in the way that you wanted. Or even if there was an error, it does not make good business sense to belittle anyone in public. Unprofessional behavior impresses no one, and don't forget that person may be your boss one day. We are all very busy, and are frustrated by apparent incompetence, but let's think before we write. Put yourself in the receiver's shoes.

As we are all in the customer service business, human behavior and communication are vital to our success. I was not particularly surprised to see in a recent Outsell report[1] that "working with others/ co-workers" came out on top of issues and challenges in the workplace. Being polite does not mean that you cannot criticize someone, but make sure that you do it in private and ask their understanding of the situation, as there may have been a misunderstanding. If possible, seek a face-to-face meeting rather than writing an e-mail, which can so easily be misinterpreted. Always apologize if you are wrong. It is not a sign of weakness to admit your mistakes.

In a delightfully titled article, "Competent Jerks, Lovable Fools, and the Formation of Social Networks,"[2] the authors posit that "one of management's greatest challenges arises from the natural tension inherent in every organization," and "it's an understatement to say that resolving this tension is crucial to success in today's knowledge-based and collaborative business environment."

The article explains that it is human nature to want to work with a lovable fool rather than a competent jerk, often to the detriment of company management. You should not aspire to being loved at work, but being respected. You will never gain respect by being ill-mannered. When I was an 18-year-old junior in an accountancy practice, the manager, who had called me into his office to review my work, said as soon as I arrived at his open door, "Get me a cup of tea, one sugar."

Ignoring mother's advice, I immediately replied that I did not "get tea" for anyone unless asked politely. Surprisingly I was not sacked; he apologized, and I got him his tea. The upshot of this was that I gained his respect for not putting up with rudeness, and he gained my respect for having the guts to apologize, and not use his seniority to tell me to get lost. Many years later we made a great team as partner and manager of the Brussels office.

Manners Maketh Man (MMM)

Following my August column on getting on with IT, I was delighted to read in an interview with Factiva's CEO, Clare Hart,[3] for whom I have the greatest respect, that she refers to the fact that if information professionals and IT professionals work together, they are much stronger. Great minds think alike.

[1] "Information Management Best Practices: Changing User Needs Require Service Revisions." *InfoAboutInfo Briefing*, May 13, 2005.

[2] "Competent Jerks, Lovable Fools, and the Formation of Social Networks." Tiziana Casciaro and Miguel Sousa Lobo, *Harvard Business Review*, June 2005.

[3] "Tying in information to business strategy." Elspeth Hyams. *Information World Review*, May 2005: 18-20.

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