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## Information Outlook, November/December 2012

Special Libraries Association

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# information outlook

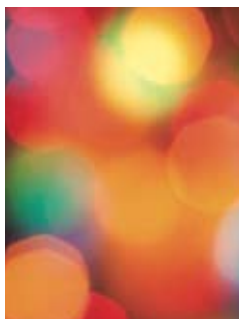
THE MAGAZINE OF THE SPECIAL LIBRARIES ASSOCIATION



MEETING USERS'  
EXPECTATIONS

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# information outlook

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*Final print issue!*

*Watch for a digital online version to debut in 2013!*

# Creating a New Environment

**By creating new and better opportunities for information professionals to share ideas, SLA is transforming its culture and positioning itself for success.**

BY JANICE LACHANCE, SLA CEO



As SLA members know, one of the most valuable benefits of joining an association is the opportunity to meet and share ideas with others in your profession. I've certainly found that to be true of my membership in ASAE, the American Society of Association Executives.

Through my participation in ASAE programs and my service on ASAE's board of directors in 2008-2010, I've met many other association executives who are also trying to help lead their organizations through difficult times. ASAE provides us with a forum to discuss how to challenge ourselves, our boards, and our staff and members to strengthen our associations and position them to survive and even thrive in uncertain times.

Most association executives I know recognize that simply trying to squeeze every last extra penny out of their budgets will delay but not prevent their demise. Likewise, creating a few new programs or services, while they may bring in additional revenues, is not a long-term strategy for success. The vibrant associations of tomorrow will be the ones that create a new environment—that embrace change and innovation, that identify and take bold steps to move in new directions, that stop speaking in nouns like *conference*, *magazine* and *Webinar* and start thinking in verbs like *transform*, *renew* and *inspire*.

As I look around SLA today, I see signs of that thinking beginning to take hold. As I write this column, SLA staff are working to finalize and launch a new

Website that looks and feels very different than our existing site. The new site will be much cleaner and simpler than the current site, but the differences only begin with the appearance. The site will be much easier for staff to maintain and update, so new information of interest to information professionals can be posted in minutes. In

the information professionals who work in them. Although the digital version of the magazine will look just as it does now, it will incorporate blog feeds, links to social media, Web apps for mobile access, bookmarks for easy retrieval of pages, tabs to indicate special features, and an array of other tools not available in the printed version. Even better, it will mark an important step in the transformation of *Information Outlook* from a static, one-way source of information to a dynamic forum for sharing new ideas, engaging in conversations, and building community.

In that same vein, we recently consolidated several of our blogs into one blog to make it easier for information profes-

**The process of creating a new environment ultimately will redefine SLA, changing it to an association devoted primarily to inspiring, transforming and renewing our members and profession.**

addition, popular features like the member directory will be more accessible, and the headings of sections will be much more intuitive, enabling SLA members to find resources more quickly.

Another transformation is occurring with this magazine, *Information Outlook*. You're holding the last printed issue in your hands, because starting in January 2013, *Information Outlook* will go digital and mobile. In both regards, the magazine is mirroring the profession it serves—libraries and information centers increasingly are not defined by physical spaces, nor are

sionals to learn about, and share their views on, new educational programs, conference presentations, industry issues, and other developments. Gone are the separate blogs devoted to legislative and regulatory matters, Click University, and the SLA Information Center; now, all new blog content is being published on the SLA Blog. As with developing a new Website and moving *Information Outlook* to a digital platform, the purpose of streamlining our blogs is to make it easier than ever for SLA members to share their energy, expertise and ideas and thereby benefit each other and their profession.



The SLA Annual Conference is moving in this direction as well. Next year in San Diego, four 120-minute time slots will be on the agenda to provide opportunities to dig deeper into relevant topics and encourage more complex thinking and discussion. Offering in-depth programming is one of many steps that will be taken to revitalize this most traditional of association activities.

The process of creating a new environment ultimately will redefine SLA, changing it from an association orga-

nized around a common profession and interests to one devoted primarily to inspiring, transforming and renewing our members and profession. Like all transformations, this one will challenge long-held beliefs and assumptions and force people to look at common situations in uncommon ways. But the result—an association that is essential to information professionals because it enhances their jobs and careers, their peer relationships, and their professional development—will be well worth

the process.

By the time I write my next column, our new Website will be up and running, *Information Outlook* will be posted online in a digital format, and registration for SLA 2013 will be open. More importantly, the transformation of SLA will be well under way, with new opportunities available for creating and sharing value. Find an opportunity that feels comfortable to you and get ready to be transformed! **SLA**

## Letters

### Dropping the Ball

Steve Hiller's article in the Sept/Oct issue of *Information Outlook* ("What Are We Measuring, and Does It Matter?") assembles a representative sample of the literature on metrics in academic libraries. However, he provides only passing reference to the literature relating to corporate libraries (Matthews 2002; Griffiths and King 1993). Given that academic libraries represent only about 6 percent of SLA's membership (based on membership in the Academic Division compared to total SLA membership), Hiller should have devoted a separate section to corporate libraries.

Matthews does an excellent job of compiling the literature on valuation, in particular listing eight studies that were published by SLA. At least four of these studies deserve specific attention in the context of Hiller's review of the literature because, in fact, SLA actually funded these external valuation studies. They are, in chronological order, the following:

- Matarazzo, James, Laurence Prusak, and Michael Gauthier. 1990. *Valuing Corporate Libraries: A Survey of Senior Managers*. Washington, D.C.: Special Libraries Association.
- Matarazzo, James, and Laurence Prusak. 1995. *The Value of Corporate Libraries: Findings from a*

*1995 Survey of Senior Management*. Washington, D.C.: Special Libraries Association.

- Kantor, Paul, and Tefko Saracevic. 1999. *Valuing Special Libraries and Information Centers*. Washington, D.C.: Special Libraries Association.
- Portugal, Frank. 2000. *Valuing Information Intangibles: Measuring the Bottom-Line Contribution of Librarians and Information Professionals*. Washington, D.C.: Special Libraries Association.

Matarazzo and Prusak used a systematic method for selecting target companies, then solicited the opinions of the individuals in these companies to whom the heads of their libraries reported. Because these studies were based on a systematically selected study population, they provided a reliable insight into the relative extent to which corporate libraries were valued.

Kantor and Saracevic used a very sophisticated methodology to identify valuation variables. Matthews (2002) discussed their study and concluded, "Unfortunately, the model developed by Saracevic and Kantor, although comprehensive, is long and difficult to replicate." In my opinion, SLA dropped the ball by not reducing the Kantor/Saracevic model to a form that could be readily applied in any corporate environment and, possibly, in academic environments as well.

Portugal approached the question using the standard business methods

of return on investment and cost/benefit analysis and added three higher-order methods: knowledge value-added, intranet team forums, and intellectual capital valuations. Portugal's study is very readable and has the added advantage of providing step-by-step examples of how to apply each method.

In addition to these eight SLA-published studies, Matthews (2002) cites a very comprehensive, but not exhaustive, list of other references. Consequently, if corporate libraries are still unable to measure and communicate their value to top management, it is not for lack of definition as to how to do it. Rather, it is the result of a failure by SLA, as their professional organization, to assimilate what is already known and, from this, to create standard templates from which corporate librarians may choose the method(s) most applicable to their individual situations.

Deanna Morrow Hall  
President  
Corporate Information Resources, Inc.  
Stone Mountain, Georgia, USA

### REFERENCES

- Griffiths, Jose Marie, and Donald King. 1993. *Special Libraries: Increasing the Information Edge*. Washington, D.C.: Special Libraries Association.
- Matthews, Joseph. 2002. *Determining and Communicating the Value of the Special Library*. Westport, Conn.: Libraries Unlimited.

## BOARD ELECTIONS · SALARY SURVEY · DIGITAL /O · LOYALTY CLUB

### Board Election Ends; Arnold to Lead in 2014

More than 2,100 SLA members cast their ballots in September to elect four new members—including a treasurer and a president-elect—to the association's board of directors:

- Kate Arnold—President-elect;
- John DiGilio—Treasurer;
- Kama Siegel—Chapter Cabinet Chair-elect; and
- Tara Murray—Division Cabinet Chair-elect.

**Kate Arnold** is a veteran information professional who has worked in the media (for the BBC), the health care industry (for the U.K. National Health Service), and the nonprofit sector (she is currently manager of the information center at the National Children's Bureau in London). Kate was a member of the SLA Board of Directors from 2006 to 2009 and has also served on the Cataloging Committee and the Public Relations Advisory Council. She has been active on the local level as well, twice serving as president of her chapter (SLA Europe) and also as sponsorship chair and secretary. She is a Fellow of the Association and received the Dialog Quantam2 InfoStar Award in 2011.

**John DiGilio** is national manager of research services for Reed Smith LLP in Chicago. He is a past chair of SLA's Legal Division, currently chairs the Legal Division's Professional Development Committee, and is the Webmaster for the Baseball Caucus. He received the H.W. Wilson Award in 2005 and has been presenting the popular "60 Sites in 60 Minutes" session at the SLA Annual Conference for many years. John is the founder and editor-in-chief of two popular library blogs: *On Firmer Ground*, a blog by and for law firm librarians, and *iBraryGuy*, which contains John's personal reflections on librarianship as well as recommenda-

tions for new library resources. He is an adjunct professor at Carlow University in Pittsburgh and is pursuing a Licentiate of Sacred Theology from Saint Raphael the Archangel Theological Seminary in Canada.

**Kama Siegel** is library technology manager for the libraries of Stevens County in Washington. She previously worked at a transportation planning and consulting company in Portland, Oregon, where she managed the company's intranet and online archives and designed and oversaw the rollout of a company-wide project management and accounting system. Kama has been involved in the Oregon Chapter of SLA since her graduate student days, serving as chapter president in 2011, and was also an active member of the Legal Division until switching to the Solo Division when she left the legal arena. She has presented at many Oregon Chapter professional development events as well as at the 2009 SLA Annual Conference.

**Tara Murray** is director of information services/librarian at the American Philatelic Research Library (APRL) in Bellefonte, Pennsylvania. Tara manages the library and archives, organizes an annual symposium on postal history, teaches classes and workshops on research, and is assistant editor of the library's quarterly journal. She joined SLA in 2001 and has served as program planning chair and chair of the Social Science Division and as director and president of the Central Pennsylvania Chapter, which she helped merge with the Philadelphia Chapter in 2008.

The four new board members will begin their terms in January 2013. They will join the 11 current members of the SLA Board of Directors whose terms continue through 2013.

### 2012 Salary Survey Published

The 2012 SLA Salary Survey, which provides salary breakdowns for information professionals by primary job

responsibility, job title, region, company size, experience, and several other criteria, has been published in PDF format and is now available for download from SLA's Website.

The survey was sent to all SLA members and achieved a 28.4 percent response rate. All salary data in the report are based on salaries as of 1 June 2012.

The survey report includes three resource articles to help information professionals prove their value to current and potential employers.

- "Using e-Portfolios to Showcase your Work, Skills, and Experience"
- "Talking to your Manager about a Raise or Promotion—Are You Ready?"
- "Staying Competitive in Today's Job Market"

To purchase the report, visit [www.sla.org/content/resources/research/salary-surveys/index.cfm](http://www.sla.org/content/resources/research/salary-surveys/index.cfm). A network-licensed version is also available.

### Information Outlook Ends Print Run, Goes Digital in 2013

This issue of *Information Outlook* marks the last printed version of the magazine, which was launched in 1997 as a replacement to the long-running *Special Libraries*.

Beginning with the January/February 2013 issue, *Information Outlook* will be published online in a digital format designed to encourage reader interaction and sharing. The digital edition will boast a variety of features, including mobile accessibility, rich media, searchable and zoomable content, and RSS feeds. Readers will be able to add notes and bookmarks, share content with colleagues, and comment on articles.

SLA members will receive an e-mail notification when a new issue is published. Links to each issue will be included in the notification and on SLA's Website.

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Vol. 16, No. 06  
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## Three Dozen Join Initial Class of Loyalty Club

More than 35 SLA members have joined the inaugural class of the SLA Loyalty Club, which is designed to encourage the association's members and partners to donate money to SLA to help improve existing programs and services and launch new ones.

Initial donations to the Loyalty Club will help SLA provide international networking opportunities at annual conferences, deliver Click University Webinars free of charge to SLA members, and publish salary surveys, all of which carry costs that are not covered by annual membership dues. As donations increase, they will support other existing programs and services or fund the development and delivery of new ones.

Members who contribute at least US\$ 100 this year obtain Platinum Level membership in the Loyalty Club and can maintain lifetime Platinum Level membership by making annual donations equal to or greater than their initial contribution. After the inaugural class of 100 Platinum Level donors is filled, annual donations will be categorized as follows:

- \$750 or more: Platinum Level
- \$350-\$749: Gold Level
- \$349.99 or less: Supporting Level

Platinum Level members will be recognized at the SLA Annual Conference, on SLA's Website, and in an issue of *Information Outlook*. Gold Level members will be recognized on SLA's Website and in *Information Outlook*. Supporting Level members will be recognized on SLA's Website.

As *Information Outlook* went to press, the following SLA members had joined the Loyalty Club:

### Platinum Level Members

Beth Autin  
Anne Barker  
Mary Ellen Bates  
Terri Brooks  
Linda Broussard  
Susan Fifer Canby  
Carol Ginsburg Gradient  
Stacey Greenwell  
Richard Huffine  
Ruth Kneale  
Ann Koopman  
Daniel Lee  
Hal and Monica Kirkwood  
Janice Lachance  
Sharon Lenius  
Kendra Levine  
Brent Mai  
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Tom Rink  
Ethel Salonen  
Barbara Semonche  
Debbie Schachter  
Donna Scheeder  
Kimberly Silk  
Jill Strand  
Ulla de Stricker  
Dan Trefethen  
Chris Zammarelli  
Gloria Zamora

### Supporting Level Members

Jill Hurst-Wahl  
Brandy King  
Sara Tompson

Donations to the Loyalty Club may qualify as a tax-deductible contribution. For more information about the Loyalty Club, contact John Walsh at [jwalsh@sla.org](mailto:jwalsh@sla.org). **SLA**



## SOCIAL MEDIA USE · DIGITIZING BOOKS · LIBRARY USE

### Few Companies Use Social Media to Monitor Risks, Competitors

Many corporate executives use LinkedIn, Facebook and other social media for personal purposes, but their companies are unlikely to employ these tools to communicate with customers or advance or protect their interests, according to a research report.

Stanford University's Graduate School of Business teamed with the Conference Board, which conducts research to help businesses improve their performance and better serve the public interest, to poll more than 180 senior leaders and corporate directors of North American companies. The survey found that although many executives and board members are comfortable using social media themselves, they have not translated their personal experiences into systemic use at their organizations.

For example, nearly two-thirds of survey participants use social media for personal purposes. (Of these, 80 percent have a LinkedIn account and 68 percent have a Facebook account.) But fewer than one-third of the companies they lead use social media to research competitors, communicate with employees and other stakeholders, or detect risks to their business activities. Most also lack social media guidelines and don't have systems in place to gather key information.

The study authors attribute these findings to the fact that many businesses are unaware of how to establish a system to collect and distill information from social media into a useable form. They recommend that companies take the following steps:

1. Assess their current capabilities with social media;
2. Determine how social media fits with their business strategy and business model;
3. Map their companies' key performance indicators and risk factors to

information available through social media;

4. Implement a "listening" system to capture social media data and transform it into metrics;
5. Develop formal policies and guidelines for employees, executives and directors; and
6. Consider the legal and behavioral ramifications that could occur if the company's board receives summary data about social media.

The complete study and the authors' recommendations are available at [www.gsb.stanford.edu/cldr/research/surveys/social.html](http://www.gsb.stanford.edu/cldr/research/surveys/social.html).

### Doctors Use Social Media to Obtain Medical Information

More than five-sixths of oncologists and primary care physicians use social media at least once a week to find, share or review health care information, and most say this practice improves the care they deliver, according to a study published recently in the *Journal of Medical Internet Research*.

Many of the nearly 500 doctors who responded to the survey said they prefer to use social networks composed of closed communities of physicians rather than open sites such as Facebook. This finding is not surprising given that social media channels contain a lot of "noise" that can be difficult to filter, but at least one co-author of the study thinks that doctors who limit themselves to closed networks are missing some of social media's benefits.

"Democratizing media has completely opened my eyes to the experience of the patient," said Bryan Vartabedian, a pediatric gastroenterologist at Baylor College of Medicine in Houston. Vartabedian credited his social media connections with patient advocacy groups for giving him "a huge appreciation for how they think."

On a weekly basis, three-fifths of the survey participants scan and explore

social media, while nearly half contribute information. One in seven survey participants said they contribute information daily.

The purpose of the study was to determine how social media can be used for professional development and lifelong learning. The study, "Understanding the Factors That Influence the Adoption and Meaningful Use of Social Media by Physicians to Share Medical Information," was published online in September.

### U.S. Court Gives Approval to Digitizing Works

A federal court has rejected a copyright infringement suit that would have prevented the digitizing of books at major universities across the country, the latest twist in Google's project to partner with academic institutions to gain access to works it wants to digitize.

The ruling by the U.S. District Court for the Southern District of New York will allow the defendants—five universities and the HathiTrust, a partnership of major research institutions that was established to help the libraries archive and distribute digital works—to continue their partnership with Google to scan volumes of books from their collections. The libraries entered into the partnership to jump-start their book digitization efforts; in exchange, Google provided them with digital copies of the works it scanned.

Organizations representing authors and publishers originally attempted to block the project by filing a class action lawsuit claiming that Google violated their copyrights by scanning the books, creating an electronic database, and displaying short excerpts, all without obtaining permission from the copyright holders. The copyright infringement suit, a related action, alleged that the HathiTrust was created from millions of "unauthorized" scans and that these scans amounted to an unprecedented violation of fair use and a gross injustice against authors.

The HathiTrust countered that its actions were “transformative” because the purpose of the scanning was to enable readers to search the content of books, which is different from the original purpose of the books themselves—to make the content accessible. Under U.S. copyright law, adding enough new material to change the nature of a protected work or modifying its purpose is a transformative act and is considered permissible.

The court agreed with the HathiTrust that it was necessary to scan the books to make their content searchable. The court also held that the benefits of such scanning to the blind and print-disabled justify making the full text of digital books, even those still under copyright, available to visually-impaired students under the Americans with Disabilities Act.

### Library Use Not Equated with Importance, Survey Finds

High school students in the United States are more likely than other young

people to use a library but less likely to say that it is important to them and their family, according to a report on how people between the ages of 16 and 29 access books and libraries.

The report, based on a telephone poll of nearly 3,000 young people by the Pew Research Center’s Internet & American Life Project, found that more than 80 percent of survey respondents had read a book in the past year, and 60 percent had used their local public library. Those at the youngest end of the spectrum—high school students ages 16-17 and college-aged young adults (ages 18-24)—were most likely to have read a book or used the library in the past 12 months, though their greater usage may well reflect school assignments.

High schoolers in particular rely on libraries to access books, obtain research assistance and get reading recommendations. But only about half said they consider the library “very important” or “somewhat important” to them and their families, compared with

roughly two-thirds of older Americans.

The survey findings also reflect the growing preference for e-content among younger audiences. Slightly fewer than half of survey respondents said they had read long-form e-content (e.g., books, magazines and newspapers) during the past year, and 4 in 10 said they are reading more than they used to thanks to the availability of e-content. Those who had read an e-book during the previous 12 months were more likely to have done so on a computer (55 percent) than on an e-book reader such as a Kindle (23 percent) or tablet (16 percent). That finding may well reflect greater ownership of computers, as 60 percent of respondents who do not currently borrow e-books from libraries said they would be “very” or “somewhat” likely to borrow pre-loaded e-readers if their library offered that service.

To read the report, visit [libraries.pewinternet.org/2012/10/23/younger-americans-reading-and-library-habits/](http://libraries.pewinternet.org/2012/10/23/younger-americans-reading-and-library-habits/). **SLA**



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—George A. Olah, 1994 Nobel Laureate in Chemistry, Founding Director of the USC Loker Hydrocarbon Research Institute and co-editor of the Legacy Collection book; *Chemistry of Energetic Materials*

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# Meeting Users' Expectations

FOREWORD BY STUART HALES, EDITOR, *INFORMATION OUTLOOK*

**W**ould you rather your co-workers, clients and customers have high expectations of you, or low ones?

At first glance, this question seems almost insulting—of course you would prefer they have high expectations of you. But high expectations demand a concomitant level of performance, and being held to that standard in a 24/7/365 society can be daunting, to say the least.

Technology makes it easier to perform at a high level, and we now take its benefits—faster computing, more efficient processes, cheaper products—for granted. But technology can also have the perverse result of *lowering* expectations for human beings, as Sherry Turkle, professor of the social studies of science and technology at the Massachusetts Institute of Technology, explains in her most recent book, *Alone Together: Why We Expect More from Technology and Less from Each Other*.

These days, insecure in our relationships and anxious about intimacy, we look to technology for ways to be in relationships and

protect ourselves from them at the same time. This can happen when one is finding one's way through a blizzard of text messages; it can happen when interacting with a robot ... We bend to the inanimate with new solicitude. We fear the risks and relationships with our fellow humans. We expect more from technology and less from each other.

These dissonant expectation levels pose a particular conundrum for information professionals, because demand for specialized services they can provide but technology cannot (such as content curation, personal information consultations, and experience development) is growing. But to deliver these and other services effectively, they must go beyond providing what information users *want*—an area in which they often excel—and identify and meet their *expectations*.

This issue of *Information Outlook* looks at users' expectations through the lens of user experience (UX), which Gretchen McNeely and Debra Kolah—the authors of both theme articles—define as “the entire psychological and

behavioral framework of user interaction, covering everything from ease of use to engagement to visual design and applying to interactions with objects, people, environments and information spaces.” The UX methodology focuses on establishing a desired end point where users' expectations are being met, and it challenges information professionals to develop a plan for achieving that end.

## ‘Skills and Passion’

In their first article, Kolah and McNeely define the basic elements of user experience—pain points, joy points, decision points and workarounds—and explain how to use them to frame a UX project. They emphasize that a UX project should be seen as a challenge and that part of the challenge is acknowledging that project resources are finite.

“Taking on too much can dilute the findings,” they write, “and result in slapping together solutions that address several problems halfway instead of addressing one problem fully.”

The second of their two articles explores the concept of usability, which goes beyond user experience to analyze



how easily a tool (such as a Website) or an environment (for example, a physical library space) helps information users accomplish their goals. Many usability tools—focus groups, user observations, one-on-one interviews—will already be familiar to SLA members, but McNeely and Kolah introduce several more and explain how they all work together to help information professionals design tools and environments that meet their clients' and customers' expectations.

Although surveys are perhaps the most popular research tool, the authors warn they are not always appropriate for usability testing. "Survey analyses often reveal a disconnect between users'

reported behaviors and their reported opinions and perceptions," they write. "A red flag should always go up when you consider asking users for their opinions."

If user research isn't an option, co-workers can serve as substitutes. "Grab some people in your organization and consider it an internal expert review," McNeely and Kolah write. "Without spending a lot of time and money, you can capture a rough but largely accurate picture of successes and challenges."

Ultimately, energy and perseverance will more than offset technical expertise. "No one involved in user experience can

be skilled at all of it," the authors conclude. "Instead, an effective contributor to UX should be familiar with the entire process, possess skills and passion for his or her role, and be focused on meeting users' expectations."

Skills. Passion. Focus. With these at your command, and a knowledge of user experience concepts and methods, the prospect of meeting high expectations in a 24/7/365 world doesn't seem quite so daunting, does it? **SLA**

# Information Professionals and User Experience

USER EXPERIENCE TOOLS AND TECHNIQUES CAN HELP INFORMATION PROFESSIONALS IDENTIFY PROBLEMS WITH USER INTERACTIONS AND DEVELOP SOLUTIONS.

BY GRETCHEN MCNEELY, MLIS, AND DEBRA KOLAH, MLIS

**A**s information professionals, we're keenly aware of how people experience information products, services and environments. We understand how people ask for information, how they process it, how they look for more of it, and how they know when they're satisfied. We often know what they're expecting, as well as what would surprise or confuse them.

In sum, we empathize with information seekers. We're good listeners. And we see patterns: linguistic, behavioral, and emotional.

These same traits—empathy, linguistic sensitivity, and pattern-finding—are crucial in shaping user experience (UX). User experience refers to the entire psychological and behavioral framework of user interaction, covering everything

from ease of use to engagement to visual design and applying to interactions with objects, people, environments and information spaces.

Although it is psychological and behavioral in nature, UX can be observed, analyzed, and influenced. This article will demystify UX and point out what information professionals bring to the table. (See the following article for tips about usability, a part of UX that is particularly relevant for information professionals seeking to meet and exceed users' expectations.)

## Touchpoints and Expectations

Any interaction offers an experience. Aspects of that experience are influenced by factors such as form, material, lighting, procedures, information

architecture, and content.

User experience is often linked to brands. But when people tell stories, they don't talk about brands. They talk about specific "touchpoints," such as a barista, a Website, or someone on the phone. They talk about whether that experience met their expectations, exceeded them, or left them disappointed (perhaps even angry). That touchpoint bubbles up into their overall perception of a brand or organization.

User experience is influenced by what the user brings to the interaction. For example, is your child feverish today? Is it sunny outside? Did you recently get turned down for a research grant? The experiences in our lives affect the way we respond to everything and how we articulate satisfaction or dissatisfaction.

No one involved in user experience



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can be skilled at all of it, or needs to be. Instead, an effective contributor to UX should be familiar with the entire process, possess skills and passion for his or her role, and be focused on meeting users' expectations.

The first step in any UX project is to identify pain points, joy points, decision points, and workarounds. A **pain point** is a problem users have with any aspect of an experience; a **joy point**, on the other hand, is something people love about your service.

You probably already know the pain point your users are experiencing; in fact, it may well be the impetus for the project. Let's say your library is hard to find, or there's temporary construction nearby, or you're having difficulty staffing the desk at busy times. Maybe your Website isn't updated and only works with Internet Explorer, or your search box is confusing. Your reading desks may be poorly lit, and there aren't enough outlets. No matter the problem, users' expectations aren't being met.

A **decision point** is a choice your users are being asked to make. In any interaction, we make decisions based on given information and circumstances. For example, the decisions you make after being handed a laminated menu may be different from those you make after being shown an illustrated chalkboard, even if the wording on both is the same. Are your users being given enough structure and freedom to make optimal choices?

A **workaround** is what people do when the obvious action fails—they use the side door to get to the library because the front door is locked, they use Google Scholar instead of your Website because the interface is easier, or they sit next door because the café's wifi is faster. Understanding workarounds is just as important as understanding pain points.

## Framing the Problem

Now that we have identified users' likes, dislikes and alternatives, we must frame the user experience problem. This important step is frequently glossed over, as it can be tedious and unsexy.

To use an analogy, you might rather hang out with George Clooney than Philip Seymour Hoffman, but Hoffman may be the finest actor of his generation. Project framing is the Philip Seymour Hoffman of UX.

In framing, we define the business challenge. In essence, we ask ourselves what we are trying to achieve. The challenge is often phrased as "We want..." to clarify that it is an objective, not a complaint.

Following are examples of some business challenges:

- We want more high school students to apply to our university because of our engineering strengths.
- We want new employees to find our intranet helpful in reducing ramp-up.
- We want to understand how science faculty seek information on our Website so we can better meet their expectations and needs.

A business challenge is a desired end state, not a pain point. Don't start a UX project by saying, "People hate our Website." Rather, frame it by saying, "We want more undergraduate students to use our information services because they find our Website easier to use."

Having framed the problem, we must now structure the project. How will we capture each touchpoint of the "customer journey," being careful to account for gaps, inconsistencies, and mixed messages?

An experience begins when the user starts thinking about a product or service and ends when he or she stops thinking about it, regardless of proximity. Can you interview your users during that time period? Observe them? Use experts? What about money and time constraints? Looking ahead, what success metrics might you establish?

When you plan a project, you always have finite resources. Act like it. What are the questions you will *not* be answering? Taking on too much can dilute the findings and result in slapping together solutions that address several problems halfway instead of addressing one problem fully.

Keep in mind that people don't interact with all touchpoints simultaneously; instead, from a specific, anecdotal experience with a gate agent, a Website, or a circulation clerk, they extrapolate entire brand impressions. What pain points seem to have the most impact on your organization's brand?

## Watching and Asking

UX comprises a lot of watching, listening and asking questions. You'll need to determine the relevant questions, the most effective and efficient way of asking them, and the best way to use them to meet your objective. Well-run research with ill-suited methodologies still equals wasted time.

Do you need quantitative or qualitative techniques? Both? The former addresses *what* and targets reported behaviors, often within large groups (>30 = statistical significance). The latter addresses *why*, relies on observation, description and insights, and may involve just a few participants.

Qualitative methods range from usability testing to ethnography to focus groups to user observation. You can also conduct usability testing on a quantitative basis, assessing a larger base and collecting metrics on multiple system aspects.

One-on-one ethnographic interviews home in on users' values, attitudes and needs, which are useful for setting up a "picture" of your target's key psychographic qualities with regard to your Website, mobile app, or physical environment. Dyads and triads encourage discussion and idea exchange. They complement expert interviews, wherein colleagues, stakeholders, or subject matter experts offer perspectives.

Quantitative techniques generate hard numbers, which can appeal to stakeholders. They lack nuance, however, and may be best for evaluative research. Surveys, which contain both qualitative and quantitative elements, have enjoyed a renaissance, as online tools make survey creation, distribution, data-gathering and analysis simple and visually meaningful.

Card sorts remain a solid way to

codify cognitive paths and assumptions. Besides the old-fashioned index card version, there are software versions that make data collection more powerful. A content audit can help your organization understand its digital voice, tone, labeling and content challenges.

Following are a few tips for conducting user research:

- **Never ask why.** *Why* makes people defensive. When people feel they have to defend their actions, they either clam up or say what they think you want to hear. Instead, say “Tell me about that,” “How was that for you?” or “What do you think led to that?”
- **Don't talk.** If you believe there is more “there” after a response, wait until just past the point where you get uncomfortable. Humans love to fill spaces. If an interviewee takes the initiative to end a silence, you'll find pearls there.
- **It's not the users' job to invent “fixes,” solve problems, or get what they ask for.** It's their job to describe their behavior, what they expect to find, and what they take into consideration. It's our job to listen, record, study the data, and develop actionable and relevant insights that we can apply to meet our users' expectations and make their lives better.
- **Conduct a dry run to smooth out language, improve flow, and stress-test stimuli.**

UX research creates wonderful artifacts. Amid the ephemera, it's nice to hold something in your hand or put it on a wall. Research can generate personas, photographs, videos, and sketches, among other things.

### Think, Guess and Present

After you've done the work and collected photographs, recordings, and notes, it's time to hypothesize, analyze, and synthesize. You may already be seeing patterns, but what do they mean?

You'll probably develop three to seven assertions about the user experience of

your information environment. If you're beyond that range, you may be restating things; if you're below it, you need to examine your scope. Are you thinking broadly enough? What insights will best help create an on-brand, consistent, delightful user experience?

Next, you need to frame your findings. Your research needs to present insights in a way that works for you, your team and your stakeholders.

You might create personas or a 2x2 framework. A persona is a clear and engaging way to communicate a target's shared values, attitudes, needs and behaviors with regard to your information environment; a 2x2 uses X and Y axes to visually convey tensions dividing users. Video snippets and quotes, meanwhile, clearly communicate how an existing information tool or environment clashes with users' expectations, needs, or behaviors.

Frameworks and stories keep us honest. If you can explain your findings to a stranger, you have an effective framework and story. If you can't, or if the findings still don't “pop,” maybe the insight isn't truly meaningful or isn't stated clearly.

Avoid locking down a solution when sharing insights. Stakeholders will come up with some themselves, and you'll develop your own. Pin them on a wall. Explore them, always being ready to—as William Faulkner said—“kill your darlings.”

### Making and Building

Now comes the fun part: brainstorming solutions. Granted, you've been making and building all along (right?), but now you're going to derive actionable insights from your effective framing and research synthesis.

By brainstorming, we don't mean you should lock your team in a room and slide some pizza under the door. Here are some ways to do it right:

- Attendees need a clear, concise overview of business objectives, pain points and key insights beforehand. Consider including uninvolved colleagues. Attendees should not be

end users, since they lack the needed context.

- A brainstorm or sketching session needs a leader, either the project lead or someone with good group moderation skills.
- Up to five people can be in the room, but no more. Beyond that, things get crazy, time gets wasted, and feelings get hurt.
- Stay flexible. You might find solutions in unexpected forms. Remember, users see brands holistically, even if they only interact with a few touchpoints. You need to consider as many of those touchpoints as possible, emphasizing the ones that you believe most affect the overall user experience while satisfying user expectations.

### Trying and Fixing

After discerning solutions, you need to evaluate their efficacy. Evaluative testing differs from front-end research—evaluation is often heavily structured, with specific tasks, inquiries, and objectives set up beforehand. These can range from task analysis and labeling to visual design and navigation preferences.

Evaluative tools can be live sites, clickable PDFs, paper wireframes or full-scale prototypes. Regardless of which tools you use, perform a dry run, never ask why, and listen when you want to talk.

When you finally launch your solution, trust your testing and have faith in your findings. Remember, any change is difficult, so give users time to absorb the change before examining the metrics. In phased projects, quantitative assessment should wait until all components are in place and users have had time to breathe.

Being information professionals positions us to have a point of view and background appropriate to UX projects. We can become advocates for awareness about UX and its role in helping meet and exceed users' expectations. **SLA**

# Usability Methods in the Information Environment

MANY TOOLS ARE AVAILABLE TO HELP IMPROVE HOW USERS EXPERIENCE THE INFORMATION SERVICES AND ENVIRONMENT YOU PROVIDE.

BY GRETCHEN MCNEELY, MLIS, AND DEBRA KOLAH, MLIS

Everyone who uses your library or information services stores memories of their experiences, particularly their best and worst experiences. These experiences create expectations that color their view of the services you provide. In other words, their past experiences determine, in large part, how they will interact with your library in the future and what they will expect from it.

Experiences and expectations are important aspects of *usability*, which serves as a key component of user experience (UX). Usability methods and tools can help you meet a user's expectations and, hopefully, exceed them. Consultant Steve Krug, anthropologists Nancy Foster and Andrew Asher, and librarian Steven Bell have much to say about ethnography, usability research methods and the design of compelling customer experiences.

Whereas *user experience* is an overarching term, usability tends to focus on things like ease of use and learnability—what it's like to interact with something, and what it's like to learn about interacting with it. Usability experts use terms like *effectiveness*, *efficiency* and *satisfaction* to capture the nuances of usable environments and answer questions such as these:

- How well does this tool or environment help a user achieve his or her goal?
- How smoothly and quickly does it do so?
- Is the experience engaging, pleasurable, and meaningful?

## Info Pros and Usability

This article provides tips for gaining usability insights in a digital environ-

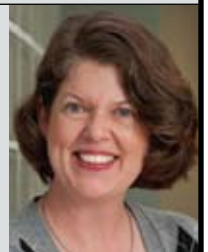
ment, an aspect of user experience that's particularly relevant for information professionals. But usability is not limited to digital interaction—our information environments also achieve varying levels of usability with regard to physical aspects such as “wayfinding,” lighting, seating, and even location. Fortunately, there are research tools and methods available to help us identify and understand usability challenges and influence positive change.

For starters, information professionals typically are empathetic—we're sensitive to user needs, and we're often good listeners. These qualities fit right into a usability toolkit, as do a lot of other methods, techniques and tools.

What's already in your usability toolkit? Believe it or not, you've probably performed some aspects of usability testing before. Ever conducted user observations? One-on-one interviews?



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Focus groups? Surveys? All of these are helpful when exploring usability.

To better understand a user's experience when interacting with an information environment (whether physical or digital), we must understand pain points, joy points, decision points, and workarounds. This is true when exploring user experience in general as well as when targeting aspects of usability. As we define these terms, think about how they might apply to your information organization.

A **pain point** is something that makes the tool, system or environment difficult to use. Poorly maintained Websites, confusing search requirements, click paths that go down the proverbial rabbit hole—all point to poor usability.

A **joy point** is something that users love about a system, service or other interaction. Joy points are sometimes hard to capture and quantify, but it's important that these positive aspects not get lost in a usability exploration.

**Decision point.** We give information to users through the labels we select, the navigation paths we build, the content we provide, and the recourse we offer if a user has difficulty with any of these steps. A delicate balance between freedom and structure ensures that users make the right decision at any given moment, which is not always an easy thing to accomplish.

**Workaround.** When something doesn't "work" for a user, he or she typically doesn't give up. For example, users will come up with new and different ways of accessing information, whether that means searching Google or bringing a friend along to help navigate an integrated library system. To offer the best user experience, we need to know what people are doing right now with what they already have.

### Research Tools and Methods

After identifying the pain, joy and decision points and workarounds in your information environment and using them to frame and structure a usability project (see related article on page 10), the next step is usually to conduct research to address the particular question(s)

you've developed. Unfortunately, you will rarely have unfettered access to users, deep pockets for funding, and a team of highly available colleagues. The good news is that there are many research tools and techniques available to overcome time, funding and resource challenges.

Your first task is to figure out the best kind of research for your project, keeping the phrase "low-hanging fruit" in mind. What research can you conduct that will have the most impact on your organization as a brand? In particular, does this project call for a *quantitative* or *qualitative* technique? The former addresses *what*, targets reported behaviors, and generally encompasses a larger group (>30 gets you to statistical significance). The latter addresses *why*, relies on observation, description and insight, and can involve as few as four or five participants. What type of emphasis makes the most sense for your project?

**Qualitative methods.** To assess the usability of an existing digital system, tool or environment, consider qualitative usability lab testing. You can choose to either moderate users' interactions with the system or let them "play" unmoderated. This method's free-form nature means that you sometimes cannot prioritize the impact and importance of problems that users are having with the system. Setting up formal tasks for users to complete and asking them to clearly articulate the rationale for their decisions can sometimes better isolate points of navigational confusion, unclear labeling, or problematic content.

To get an overall sense of user behaviors, preferences, and difficulties within your information environment, consider user observation and ethnographic interviews. One-on-one, semi-structured interviews can build rapport with users and encourage them to communicate what they value most in an information environment, how they feel about the current environment, and what would help them meet their goals more effectively. Ethnography can take the form of a long study or employ rapid approaches that can be conducted

within tight time constraints.

Expert interviews can be similarly helpful. Some UX projects require you to understand the content that your users value versus what your organization's stakeholders value. You'll need to capture the language used by those stakeholders. Do they talk about information in the same way that staff members or users do? (Unlikely.)

Especially if you are working with a mock-up of changes that might happen on a Website or revisions to field displays in a catalog record, tightly moderated dyads and triads can be a good way to encourage discussion among users. Variances in user preferences and behaviors often reveal themselves quickly, saving you time. Concerns include the fact that, on occasion, one participant will dominate the discussion; another concern is the likelihood that attendees will try to please the moderator and other participants (this is called the social desirability bias).

Be aware that you probably have more than one target audience and that within your audiences you'll encounter differing needs, attitudes and values as well as potentially differing pain points, joy points, decision points and workarounds. A simple dry run with a colleague who is not involved in the project will highlight issues with question phrasing, conversation flow, and any interview exercises or stimuli you might be considering.

If you don't have funds to hire an outside evaluation expert, use "bootstrap" techniques. Talk with a local UX organization, bring in UX speakers, try different techniques, and read, read, read. If you don't have the money for a usability lab, a dedicated computer using the free program BBFlashback Express will get you a ton of data with actionable results.

**Quantitative and hybrid methods.** It's also possible to conduct usability testing on a quantitative basis, either moderated or unmoderated. This approach allows you to assess a larger user base and collect reliable metrics on multiple aspects of a system or environment, though it requires the availability of a



ready-for-prime-time prototype of the system or environment being studied.

Testing a prototype allows you to poke and prod at hypothetical solutions or simply get a “lay of the land” when it comes to pain points and workarounds. Evaluative testing lets you place options—labels, wireframes, clickable PDFs, posters, you name it—in front of potential users and track their responses to see whether you’ve addressed their concerns. These tests can be structured to include inquiries about topics ranging from task analysis and labeling to visual design and navigation preferences. You’ll learn which language choices your users make, how they define terms, and whether the way you are clustering concepts together makes sense to them. (As with generative research, always test things with an uninvolved colleague first.)

Quantitative research techniques are often appealing to outside stakeholders and UX teams alike because they offer distinct numbers, statistics and graphs that can be used to explain or defend design decisions. Keep in mind, however, that many quantitative techniques fail to capture nuanced, emotional aspects of the user experience. This is one reason they are most effective near the end of the project, after a working prototype has been established.

One technique that has garnered a great deal of attention recently is eye tracking. Eye tracking is designed to identify elements on which users are concentrating their attention, which can indicate areas of interest or confusion and aid in navigational and labeling decisions. It is usually expensive, however, and it adds complexity to usability testing that may not be necessary.

Surveys, which are usually conducted online, are useful for assessing behaviors among a specific demographic of users in order to gather user opinions about an existing or hypothetical interaction. The advantages of surveys include their low cost and straightforward analysis and the relatively small amount of preparation required. On the down side, survey analyses often reveal a disconnect between users’ reported

behaviors and their reported opinions and perceptions. A red flag should always go up when you consider asking users for their opinions.

Surveys are probably the most frequently used UX research tool, which is not to say they are the most appropriate method for addressing usability challenges. Keep your survey under 12 questions and always perform a “gut check” with an uninvolved colleague to catch odd phrasing, bias or vagueness. Closed-ended survey questions are useful for noting existing behaviors and concerns, while open-ended responses offer a snapshot of common terms and linguistic conventions among users.

Surveys are not a good way to elicit users’ opinions of hypothetical changes or improvements, although they are often shoehorned into this role. In fact, it is never a good idea to ask users what they want. (Learn more about this and other tips for researchers in the accompanying article on page 10).

Don’t neglect the classic card sort. It serves as an effective, hands-on, qualitative tool early in the process and, when conducted digitally, can be a great quantitative method to help validate information architecture later on.

Card sorts, usually conducted with users, can help you work through content labels, shift them on the fly, and begin to grasp the political and emotional power of a mere word. This type of iteration, quick prototyping, and back-and-forth can be crucial to helping users feel involved, engaged and heard. When conducted with clients or stakeholders, card sorts can bond people together and help communicate tricky or political aspects of language.

### Matching Methods with Objectives

Altogether, there are probably hundreds of tools and methods you can use to understand and draw insights from user behavior to help improve the user experience. In many instances, however, keeping it basic is best.

There may be times when you have a slow-paced, well-resourced, well-fund-

ed usability project and the luxury of developing detailed, sensitive research tools, employing avant-garde methodologies, and recommending cutting-edge solutions. However, you can derive a great deal of insight through casual interviews, sticky notes and markers, basic evaluative testing, and sorting index cards into piles. A poster propped up in the corner of a user space can glean gobs of information.

The method you use need not be complex—it simply needs to be appropriate to the objective. If the method is appropriate and the person performing the research is skilled at listening and observing, you’re going to get there.

Yes, occasions will arise when you don’t have the resources to embark on in-depth testing. That’s when you grab some people in your organization and consider it an internal expert review. Without spending a lot of time and money, you can capture a rough but largely accurate picture of successes and challenges.

Although the intertwined worlds of usability and user experience can initially seem overwhelming, the use of research methods doesn’t have to be. Read. Experiment. And remember, including users in usability testing from the beginning (or at least at the end) helps ensure that you understand their expectations and gives you a huge chance to design the experience and environment for them, and not just help them understand what you designed. **SLA**

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# 10 Questions: Tim Siftar

WITH STINTS IN CORPORATE, NONPROFIT AND ACADEMIC ENVIRONMENTS, TIM SIFTAR HELPS ASPIRING LIBRARIANS MAKE SENSE OF THE MANY CAREER OPTIONS AVAILABLE TO THEM.

BY SUZANNE ARIST, MA

In the complex world of special librarianship, Tim Siftar has journeyed widely—yet stayed in virtually one place.

He's worked for a nonprofit organization that assesses the quality of health care professionals, a large accounting and consulting firm, and a regional economic development Internet portal. His job titles over the years have included competitor intelligence analyst, project manager, knowledge manager, and information analyst. (He only became a librarian after taking his current job at Drexel University.) And he's done all this while never leaving the neighborhood to which he moved for graduate school—in fact, he's ridden the same trolley line to work for more than 20 years.

Tim's flexible nature and sense of place have manifested themselves in

other ways as well. He's a member of SLA's Emergency Preparedness and Recovery Advisory Council, which focuses on how information professionals around the globe can help organizations, governments, and individuals recover from the effects of natural disasters, many of which are quite destructive. Yet he also participates in various activities and organizations dedicated to preserving the heritage and flavor of his community in Philadelphia, where he has lived for 20 years.

Tim is an active member of the SLA Philadelphia Chapter, where he is the chairperson for career guidance and student relations. *Information Outlook* caught up with Tim in October, with the school year—and the job search cycle—in full swing.

**In addition to your work as a librarian at Drexel University, you act as faculty advisor to student chapters of several professional associations, including SLA. Why did you get involved in this role, and what do you learn from it?**

As the librarian with the subject discipline of librarianship at my university, I have an incentive to maintain good ties with students in the MSLIS program. I call it part of my “embedded” strategy. But in reality there's a lot of mentoring and networking that I get to facilitate with students beyond any conventional “reference” related to their schoolwork.

The students typically know little about corporate or vendor employment opportunities, and they haven't considered any information professional roles outside the library. It's fun to expose them to new career options by introducing them to SLA members through tours or guest speakers. So taking on a faculty advisor role for the student chapter was a no-brainer.

Then, on the other side of that relationship, I volunteer for the Philly Chapter as career guidance and student relations chair to advise the local chapter on how to best reach out to the

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students. These are functions I would perform anyway, so why not have the title? Besides, it's a good reason to attend happy hours!

By virtue of these dovetailing roles, I learn what job prospects students are facing and meet new professionals whom I otherwise might miss. And being social this way reminds me of the importance of networking and comparing experiences for new librarians—it sounds trite, but it is so true. I have seen job offers for more than one student that resulted from chance encounters during these events.

**Prior to coming to Drexel, you spent many years in corporate librarianship working in knowledge management and IT project manager roles as well as analyst positions in market research and innovation centers. Why did you choose that career path, and why did you leave it and enter academic librarianship?**

You must have surfed my LinkedIn profile to come up with this question! Well, my previous titles over eight years included competitor intelligence analyst, project manager, knowledge manager, and information analyst. Only with my current job did I get the “librarian” title.

Career paths tend to be the intersection of whatever motivates you at that point in your life and whatever is available. I finished my info systems and library-info science degrees during the tech bubble of the mid- to late '90s. It just so happened that the non-librarian jobs seemed more exciting, albeit riskier. When employers merged or were bought out from under me, I had to make a decision and each time tried pushing my comfort zone. In each of my corporate roles, I was the first one to hold that newly created position.

With hindsight, the better investment may have been to stick at one position and seek to move up the management track. But during those go-go years, taking jumps into new roles and new industries was too tempting. Job security never seemed to be an issue.

There were so many opportunities in

downtown Philly that I never had to relocate from the neighborhood in which I settled for grad school. All my employers have been located up and down the central commercial corridor of Market Street, within a span of 22 blocks. I have either walked or taken the same trolley line to my various employers all these years, just changing the stops where I got off.

My decision to leave the corporate world incurred a pay cut. But that decision arose just after starting a family, and the security and extra breathing room in academia seemed worth the tradeoff. My current position is the one I coveted when I attended library school, so I feel as though I'm doing alright.

**What lessons did you learn in the corporate world that have helped you at Drexel, and what have you learned as an academic librarian that you wish you had known in your corporate work?**

Corporate experience afforded me some key lessons in self-knowledge—in particular, about environments in which I thrive—plus the value of having a good manager who's got your back and is invested in your success. As is often the case, the politics behind the roles I was hired to perform in were not altogether obvious at the outset. Even my best go-getter attitude encountered obstacles lurking outside my immediate responsibilities. But persistent curiosity and a good service orientation mostly cleared the way for success, even with the tough customers.

With every new position, I had to learn how to use my naiveté as a professional asset, listening to clients very carefully and not relying on preconceived notions of how the business worked. Corporate jobs taught me the benefit of building relationships to understand what motivated clients, then getting inside their workflow to figure out how to add value. For instance, I found that my own habit of creating a personal “cheat sheet” to navigate every new organization I joined could be repurposed as a pathfinder that other new hires found useful to hit the ground running.

I think many of my conventional

library and information science skills and professional values gave me an edge in positions where my counterparts had the more typical corporate MBA or programming backgrounds. For example, sharing information rather than hoarding seemed a better strategy for all-around success.

As for lessons learned from academe, Drexel is a private university founded around business and engineering, so it tends to be on the entrepreneurial end of the academic spectrum. But I love how the academic culture carries over to the librarians whose personal interests are seen in a similar light as the “research areas” of faculty.

We librarians are staff, not faculty as is the case at some state colleges. But the fact that I get a travel budget to pursue areas of the profession in which I take a personal interest and to participate in my professional community is very motivating. Corporate settings, with their short-term goals, never managed to engage my aspirations on this deeper level and channel them toward professional development. Doing so could have captured more of my loyalty and innovative energy.

**I understand you travel frequently with your wife, Myriam, who founded and is now president of a language translation service. Have you considered becoming more familiar with French and Spanish and using them in your day-to-day activities at Drexel?**

*Mai oui! Por supuesto!* But, of course! While a smattering of classes and several months in France and Central America over the years let me communicate in a household or tourist setting, my language skills aren't to the level where I could use them regularly at work. Whenever I'm presenting to classes of foreign students, it helps break the ice to greet them in their language or interject a few familiar words into the conversation. But to function in my professional capacity in another language would be a stretch for me in the absence of a concerted effort.

My wife's language services company operates in all languages, so picking



up a few key words of greeting or thanks from her in the main languages I encounter at work can go a long way. Non-native English speakers are generally pleased whenever I make an effort to connect with them in their language, even if it's just a symbolic gesture.

### **When and why did you join SLA?**

Back in the early to mid-1990s, the SLA Philly Chapter had a group called “the Downtowners” that got together at lunchtime for roundtable talks or socializing. All of a sudden, I was meeting info pros from major employers in the region who were very encouraging about my professional success. SLA just seemed very lively and connected.

Also—and this is something I figured out several years later—special librarians are typically the only ones in their organization who know what their job entails. The majority of them have no one else who does the same work in their organization, so they have an additional motivation to seek out colleagues to collaborate and compare experiences.

The student group I advise just started a monthly series of similar outings that we call by the same name, and it's a great reason to get out and circulate. Only recently have I seen the local events from the ALA-affiliated organizations increase to the frequency that I have enjoyed for so long in SLA.

### **You're a member of SLA's Emergency Preparedness & Recovery Advisory Council. Why did you join this panel, and what types of issues and projects does the council address?**

Wandering into the EPRAC meeting at the SLA National Conference in 2011 opened what seems to be a new frontier in my professional life. I love the way transformations like that can happen at SLA conferences.

The council itself is just a few years old, inheriting the work from the Natural Disasters and Accidents “IPANDA” group that was formed in the aftermath of the Southeast Asian tsunami back in 2005. What attracted me to EPRAC was how the discussion went far beyond “keeping the books dry” to include a



**Tim enjoys the garden outside the Librairie de L'Hotel de Sully, a bookstore located in a 17th-century mansion in the Marais section of Paris.**

strategic knowledge leadership dimension in anticipating and responding to disruptions. That's the sort of thing I find highly compelling due to how it connects with my varied info pro roles.

In previous professional roles, I monitored the business landscape for emerging threats and opportunities and reported market studies or new product proposals to senior management. Working to manage or create disruptions for my various employers offered some of the most rewarding projects of my career. Out of personal interest, I've tracked environmental news for a long time, and the predictions indicate unprecedented changes 5, 10 or 20 years out. We should expect a world that writer Tom Freidman called “hot, flat and crowded” in his book of the same title. Throw in the explosion of real-time social information, geo-located data and smart devices, and I perceive many opportunities for information professionals to take on greater leadership roles in disruptive situations.

Successful information specialists bring order to chaos and context to details, decipher and interpret inter-disciplinary jargon, and are cool under fire. One CI presenter at our last conference in Chicago referred to us as “information

ninjas”—that's a term I take to heart. If we are headed into the unmapped territory of truly unprecedented disruptions, I think all our employers stand to benefit from having information ninjas at the forefront of strategic planning and response efforts.

EPRAC has plans to develop a simulation to immerse participants in a specific disruptive scenario so they can test new technologies as well as their own personal networks within their employer and local communities. The focus, at least where I'm pushing, is on boosting the information specialist's regular participation in formulating and maintaining a business continuity plan for the whole organization in the context of unprecedented disruptive events. This would mirror efforts by the NLM [National Library of Medicine] and MLA [Medical Library Association] to train medical librarians to better handle the information surrounding public health aspects of disasters.

EPRAC does not yet have all the answers, but is seeking to move the conversation forward about widening the typical SWOT analysis to account for disasters. I see this issue as an opportunity for the profession to grow, similar to how info pros were often the

first to add value for their employers by licensing external content or setting up an intranet to share knowledge.

**You clearly are invested in Philadelphia—you're involved in community associations, including the Spruce Hill Community Association and the Philadelphia Community Access Coalition. How did you develop such strong connections to your city?**

Well, like I was saying before, I've lived in my 'hood for more than 20 years. There's turnover from the university population, but a bedrock of diverse, stable neighbors. Riding the trolley that long, you get to know people.

Good causes abound. The local library branch, block group, food co-op, faith community and children's nursery school all need committee members. I don't have conventional hobbies such as football or stamp collecting. Going to local concerts, joining advocacy groups when I'm concentrated on something—that's how these connections get created. I'm probably a member of more "friends of" groups than I can recall. It makes for more newsletter reading, but keeps me connected to what I care about in the world.

**One of your many interests is cooperative games. What are cooperative games, and how did you get involved in this hobby?**

Back in the 1960s, they had something called "New Games," which were essentially new interpretations of folk games that people have always played. My parents led events for churches and community groups for several decades, moonlighting from their professional jobs. This entailed folk dancing, dramatics, participatory sing-along and games. The games always seemed to bring the group together. Once the group jelled, it was ready for anything.

The "cooperative" label really means that the competitive aspects are directed toward achieving one's personal best. These games focus on the joy of the moment without placing undue pressure on keeping score or the win/lose aspect.

At some point in my professional life,



**Throughout his professional career, Tim has taken the same trolley to work every day.**

I started seeing similar activities introduced in my workplace as "icebreakers" or "team building" events. Within the last 5 or 10 years, serious gaming and simulations have also gained traction in many educational settings and seem to take advantage of the same experiential quality of the cooperative games. If you read that already classic recent book on gaming called *Reality is Broken*, the author credits this same cooperative games movement as the source of inspiration for what has become the video game industry. I still prefer the non-video version. I feel as though cooperative games keep me socially nimble in the small group setting, and open to new possibilities.

**Speaking of cooperation, do you think there are opportunities for librarians in public, school, and specialized settings to work together to address common challenges?**

This question is a tricky one. Librarians already do cooperate in so many ways—establishing standards and consortia, sharing open source code, and flocking to endorse the latest innovative products from vendors. Our clientele and organizational cultures are so different that efforts to collaborate on specific projects can get tripped up so easily; for example, imagine trying to coordinate corporate reference services with a public school library!

But within those zones of shared interest where we all face the same issues, such as harnessing knowledge

to address disruptive events, I think we possess an awesome collective sphere of influence. Instead of the six degrees of separation popularized by Kevin Bacon, I'll bet librarians are closer to three degrees of separation from anyone in North America based on our market penetration.

I've heard it said that the biggest advances we stand to gain in the future have to do less with technology and more with how we organize our efforts to work together. Think about our core professional values and brand recognition within our communities, spurred on by emerging real-time social technologies. It won't be long before we are each walking around with the equivalent of the Red Cross Digital Operations Center on our mobile device. Add it all together, and I believe there is good potential for librarians to span boundaries to act together in what some are calling "intelligent swarms" that go beyond flocking Facebook groups or dancing musical smart mobs. Picture a couple hundred thousand plugged-in librarians, self-organizing by way of some future "Twitter on steroids" to resolve problems using evidence-based knowledge.

Part of what got me into library school was hearing in 1990 about something called the Internet. I knew librarianship would put me in the midst of it, and I jumped in. Based on what we know right now about the rate of technological change, our role in our communities and the disruptions coming down the pike, I think we need to take a good look at what our profession has to offer society and say, yeah—we need to be a part of the solution. And just jump in.

**What one piece of advice would you give to a library student who is undecided between business librarianship and academic librarianship?**

The advice I give to students is to take the best shot at what makes you happy, and just jump in somewhere, recognizing that your career will grow as you do. Definitely take calculated risks, if you can afford doing so. Make the most of every experience—it all adds up. **SLA**



# Encouraging Reuse of Nonprofits' Information

LIBRARIANS AT NONPROFITS HAVE AN OPPORTUNITY—AND AN OBLIGATION—TO ENCOURAGE THEIR ORGANIZATIONS TO LIMIT LICENSING RESTRICTIONS ON THE INFORMATION THEY PRODUCE.

BY JOHN TOMLINSON, MLIS, MA

In the library and information professions, we often hear about innovative approaches to copyright (such as Creative Commons licenses) and the value to society of encouraging at least some material to be shared and reused. How much material and how to share it are debated, but the concept is popular and has growing support. It is also attracting attention in other information fields, such as publishing and journalism.

But is there much awareness of the possibility, and perhaps even the value, of promoting greater reuse of information in other, less information-focused fields? A brief look at one small set of nonprofit organizations—members of the largest alliance of U.S.-based nonprofits in the field of international development—suggests the need for more attention to easy reuse of information that nonprofit organizations produce.

## Two Premises

This essay is built on two premises. One is that nonprofit, public-serving organizations have an ethical obligation to share information about their work. The second is that it is often easier to copy a document or section of a document containing information than to extract specific facts.

The first premise can be set aside when it is at odds with other important goals of the organization, such as the pursuit of its mission, the privacy of constituents (donors, beneficiaries, staff, board members, or others), or the financial health of the organization itself. But in the absence of one or more such concerns, there are two reasons why nonprofit organizations should share information.

The first reason is to improve transparency and accountability to the public. This principle is well established in

codes of conduct for nonprofit organizations—for example, the Panel on the Nonprofit Sector, a group of nonprofit and philanthropic leaders, developed a set of governance recommendations in 2007 which state that a charity “should make information about its operations, including its governance, finances, programs and activities, widely available to the public.”

The second reason, which is not as clear-cut, is that if an organization collects or creates information about how to address a particular problem in society, it should share that information so others can use it to address the same problem. (An exception to this is for a problem the organization feels it can resolve completely by itself.)

The second premise—that it is often easier to copy a document or section of a document than to extract specific facts from it—also has its limitations. Facts cannot be copyrighted, so copyright need not limit the reuse of facts produced by nonprofit organizations. Still, wholesale copying may be easier for users from a technical standpoint, and a copyright approach that encourages sharing could aid in side-stepping concerns about possible illegality.

The first premise is analogous to,

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although not as strong as, the rationale for why most material produced by the U.S. Government is placed outside the bounds of copyright protection. The expectation is that such information will be shared in ways that allow reuse by the public, because the public paid for it. In Commonwealth countries, on the other hand, copyright in most national government materials is held by the governments themselves, but calls for reforming or eliminating what is called “Crown copyright” use the same rationale (Nilsen 2010).

The first premise has been reinforced by various governmental bodies that recognize and promote the value of widespread sharing of information. For example, the World Summit on the Information Society released a Declaration of Principles (2003) that contains a section on access to knowledge. That section states, “The sharing and strengthening of global knowledge for development can be enhanced by removing barriers to equitable access to information for economic, social, political, health, cultural, educational, and scientific activities.”

A culture of sharing has also emerged outside government, through initiatives such as Creative Commons, which enables people and organizations to license their creations in ways that allow copying and reuse by others while still retaining copyright themselves. In a little over a decade, an estimated 350 million items have been released with Creative Commons licenses (Creative Commons n.d.). Other initiatives to make it easy to license material for reuse by others have become widespread as well—for example, the GNU Free Documentation License is used by Wikipedia to allow copying of its material (with certain restrictions) without requiring that users ask for permission to do so.

**Nonprofit Copyright Practices**

What, then, are current nonprofit practices encouraging the reuse of information? To get a sense of nonprofit organizations’ preferences in this area, I looked at a small but distinct subset of

such organizations—the 193 members of InterAction, an association of U.S. nonprofits working internationally.

The largest organization in InterAction has an annual budget of almost \$1 billion, the smallest less than \$100,000. These groups work on difficult-to-solve problems such as poverty, disease, conflict, human rights violations, and lack of access to vital services. None are schools or libraries themselves, though some support education and literacy. Synergos, the organization for which I work, has helped fight poverty in 30-plus countries and was an InterAction member for many years.

I looked only at the home page of each organization’s Website for copyright information; if no such information existed but a link to a “terms of use” or “legal” page was available, I looked at that page. Thus, this survey is not an analysis of all content on these sites, and it includes only a tiny fraction of the more than one million nonprofit organizations in the United States and the tens of millions of such organizations around the world.

Of the 193 members of InterAction, only two—the International Medical Corps and the American Friends Service Committee—used Creative Commons (CC) licenses in late 2011. Both chose forms of the CC attribution-noncommercial-no derivatives license. Ten others used their own copyright language to allow sharing of their content for noncommercial or educational purposes, with some attribution. These seemed similar to the CC attribution-noncommercial license, but lacked the standardization of a CC license.

Of the remaining organizations, 135 had explicit statements indicating they reserved copyright for themselves, while 46 had no copyright statement at all. The lack of a copyright statement does not mean these organizations intended to forego copyright protection for their materials (though that is possible), since such a statement is not necessary to retain copyright.

In total, only 12 of the 193 organizations I studied explicitly encourage copying of their material (apart from fair

**Copyright Terms of InterAction Members**

(based on Website home page/terms of use page declarations)

Traditional copyright statement	135
No copyright statement	46
Custom non-commercial statement	10
Creative Commons BY-NC-ND	2
<b>Total</b>	<b>193</b>

use), and all 12 require such use to be noncommercial. This finding was disappointing, and it suggests several possibilities. One is that, in general, these organizations take a very proprietary view of the information they produce. Certainly some of them do—several even listed terms of use of their materials that asserted rights beyond what copyright protection provides.

For example, Handicap International’s Website (2012) states, “You may not modify, copy, distribute, transmit, display, post, reproduce, publish, create derivative works from, transfer or sell any pages, data, information... unless you have the prior written consent from Handicap International.” Data are facts, which cannot legally be restricted in this manner.

**Fear of Reuse?**

Related to the proprietary attitude is a fear among some nonprofits that their reputation will be damaged if critics copy and distribute some of their information. But one exception to copyright protection is what is called fair use in the United States and fair dealing in many Commonwealth countries. Fair use can include “... quotation of excerpts in a review or criticism for purposes of illustration or comment; quotation of short passages in a scholarly or technical work, for illustration or clarification of the author’s observations; [and] use in a parody of some of the content of the work parodied” (U.S. Copyright Office 2009). Fair dealing is similar—in the United Kingdom it includes some uses for “noncommercial research or private study, criticism or review, or reporting

current events” (Intellectual Property Office n.d.). Thus, copyright does not necessarily protect an organization from criticism using its own material.

Another possibility is that many of these organizations do not view content on their Websites as useful to others and instead see it merely as marketing material. In such cases, however, protecting against easy reuse would not seem important. Indeed, allowing others to copy and distribute an organization’s material, with the organization’s name on it, could be beneficial in terms of publicity.

The final possibility is a lack of understanding of the purposes of copyright or of available options to promote the sharing of information in a way that might benefit the public while retaining recognition for the creation of that information. I hope that more nonprofit organizations involved in international development become aware of the options for promoting reuse of their work while retaining ownership of it. These issues are frequently discussed among educational and library-related groups, but do not appear to be of as much interest within this subset of the nonprofit sector.

The fact that all 12 of the organizations that explicitly allowed copying and reuse of their material required such reuse to be noncommercial in character is also disappointing. Granted, there is a visceral argument for imposing such a restriction: Why should a company or individual be allowed to profit from work performed for a charitable purpose? But is that argument correct?

Erik Möller (2006) makes a compelling two-part counter-argument that noncommercial restrictions in licensing undermine easy reuse of information. On the one hand, he points to large-scale collections of materials (such as Wikipedia) that will not accept content that does not allow commercial reuse. This policy is designed to encourage reuse in as many ways as possible, and the success of Wikipedia suggests it is valid. If a content producer wants material to be placed in a collection such as Wikipedia, it should be aware of the

policies of such large collections.

His second argument is simply to question why a noncommercial (NC) restriction should be put in place. If information is valuable and the owner wants it shared, why restrict reuse?

“The use of an NC license is very rarely justifiable on economic or ideological grounds,” he writes. “It excludes many people, from free content communities to small-scale commercial users, while the decision to give away your work for free already eliminates most large-scale commercial uses.”

There are other examples of “re-publishers” not accepting open license material due to noncommercial restrictions. One is the CBC-Radio Canada’s decision to stop using Creative Commons-licensed music, which prompted Peter Kern (2010) to write, “The popular ‘noncommercial’ restriction is problematic. It does too little to prevent exploitation, and too much to prevent exactly the kind of use that’s the reason you’d choose [Creative Commons] in the first place.”

A report from Creative Commons reinforces that argument, stating that “compelling use cases for NC licensing remain—most obviously when an existing significant revenue stream from a work would be compromised by release under liberal terms” (2009). It is unlikely that much material on the Websites I examined can produce revenue other than donations to the producer. And it is unlikely that another nonprofit organization seeking the same donations would reuse material and credit the source, because doing so would be publicizing a competitor for funding.

### An Opportunity to Advocate

The nonprofit sector’s lack of familiarity with copyright issues presents information professionals in that sector with an opportunity to advocate for greater sharing of information in ways that encourage reuse. Creative Commons licenses are an obvious choice for much of this material, but it is important not to assume that a noncommercial license is the default choice simply because an

organization is not in business to make money. Rather, information professionals should look first at their organization’s purposes for sharing information and choose policies and licenses based on those goals.

Creative Commons offers a variety of licenses without restrictions on commercial use. If widespread reuse of information is a goal, avoiding commercial restrictions might be more appropriate. **SLA**

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# A Beginner's Guide to Near Field Communication

THOUGH STILL IN ITS EARLY PHASES, NEAR FIELD COMMUNICATION HAS THE POTENTIAL TO CHANGE THE WAY INFORMATION PROFESSIONALS COMMUNICATE WITH CLIENTS.

BY SOPHIA GUEVARA, MLIS

A few months ago, while researching technology topics for my monthly post to a philanthropy blog, I stumbled across the topic of near field communication, or NFC. NFC is a short-range technology that allows information to be exchanged between tags and mobile devices or between mobile devices. Though I had never heard of NFC, the technology seemed to be in the beginning stages of adoption, and its uses for making payments and sharing information really grabbed my interest.

Given NFC's many applications, I believe that, over time, it will steadily grow more popular as more mobile phones and tablets become NFC-capable. I also believe it is essential for information professionals to stay on top of this technology, as it may change the

way information is delivered.

As a result of my research and growing interest, I have written about this topic and hosted a virtual learning session on it. Slowly but surely, news of NFC is spreading—in my meetings with other information professionals and those involved in philanthropy, I am fielding more and more questions about the technology and its potential uses.

## Eight Common Questions

Following are eight of the most common questions I'm asked about NFC and the answers I usually give. I hope these questions and answers will provide you with the knowledge you need about this technology to determine if it might be right for you and your organization.

**What tools are used with near field communication, and how can I program them?** Near field communica-

tion makes use of programmed tags that may be sticker-thin or, if they are water resistant, a bit thicker. The user touches the tag to the back of his or her NFC-enabled phone or tablet to add content to the tag. If the option is available, the user can also choose to "lock" the tag so that its content doesn't get changed by someone else who knows how to program tags.

If you have an NFC-enabled phone running on Android, you can go to Google Play and type NFC to see which applications are available. In addition to programming content to the tag, there are applications available that can help you program tasks to help you automate simple processes.

### Do the NFC tags require batteries?

No, the NFC tags themselves do not require batteries to work.

**How does NFC technology differ from the use of QR codes?** With QR codes, you must have decoding software already installed on your phone. Then, you must make sure you get a good "capture" of the image so that your phone can direct you to the content associated with the code.

With NFC, all you have to do is place your NFC-enabled phone within a few centimeters of the tag. Once that is

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done, you can see the content or the site to which the tag wants to direct you.

NFC is also being used to provide consumers with “contactless” mobile payment options. Google Wallet is one of the better-known payment systems currently making use of NFC. In the coming months, ISIS may come to the forefront of contactless payment technology utilizing NFC.

**Which mobile devices have NFC technology?** Visit a Website called [nfcworld.com](http://nfcworld.com) to see lists of phones that are NFC-enabled ([www.nfcworld.com/nfc-phones-list/](http://www.nfcworld.com/nfc-phones-list/)). As for tablets, the Google Nexus 7 has NFC technology built right into it.

**Does the iPhone have built-in NFC technology?** As of this writing, no.

**How do I obtain NFC tags?** Several online retailers sell different types of NFC tags—a quick search on “buy NFC” will generate a list of merchants that sell them. I have purchased most of my NFC tags and keychains from eBay, but with Samsung’s recent release of TecTiles, you can now find NFC tags at stores and kiosks that sell mobile telephones. With a price of \$3 per tag, TecTiles are more expensive than a generic NFC tag.

**Are there different types of tags, or are they all the same?** For the most part, there are four major types of tags, each with different memory capabilities (NFC Forum 2012). Type I has 96 bytes of memory, Type II has 48 bytes, and Types III and IV vary.

**As an information professional, how can I apply NFC technology to my own work?** Following are three ideas for using NFC to change the way you serve your clients.

Idea 1: Use NFC sticker tags to make “smart” books. If you work in an organization where your colleagues yearn for easy access to book reviews while browsing the library collection, NFC can be your solution. With NFC tags, you can place a sticker tag on the book’s cover and program it so that it links to a page of reviews to help your patrons decide if the book is right for them.

Idea 2: Make “smart” posters. Create

a smart poster that can pass along information to employees with a quick tap. All you need to do is affix a pre-programmed tag to an already existing poster and note that the poster is NFC-enabled. Cut down on your organization’s silos by creating a poster that provides messages and updates from your organization’s leaders and their departments. On their walk into work, employees can tap the tags that are of interest to them and get updates on important things going on within the organization.

Idea 3: Use NFC in your information literacy training program. For example, if you provide information center orientations to new employees, create a tag with links to the resources you describe. Instead of giving these employees a list of resources and links on paper, give them an NFC tag that contains the resource information within the tag. This is not only an efficient means of sharing information, it also decreases the problem of having training sheets lost or thrown away.

### Staying on Top

As my answer to Question #8 makes clear, I believe information professionals can and should use NFC technology to help meet our clients’ needs and enhance our value to our organizations. At the very least, NFC will change the way we distribute information to each other and to our colleagues within our organizations. As the use of near field communication continues to grow, and as more devices capable of reading NFC tags are made and sold, the information profession will be pressed to stay on top of this technology and identify new ways to implement it. **SLA**

## Info File

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# The Role of Research in Venture Capital Investing

THE RESEARCH SKILLS REQUIRED TO SORT THROUGH THE MARKETS, COMPANIES, ISSUES AND INDIVIDUALS RELATED TO A POTENTIAL DEAL ARE PERFECTLY SUITED TO THE MODERN INFORMATION PROFESSIONAL.

BY MICHAEL HILL, MLIS

According to the latest research from the National Venture Capital Association (NVCA 2012), venture capital is responsible for roughly 12 million jobs and \$3 trillion in revenue in the United States and accounts for 21 percent of its gross domestic product and 11 percent of its private sector employment. In 2010 alone, venture capitalists invested approximately \$22 billion into more than 2,700 companies, 1,001 of which received funding for the first time.

For those who know the term “venture capital” but aren’t entirely sure what it entails, venture capital firms (there are about 460 of them in the United States) raise funds from large, institutional-type investors—think pension funds, endowments and the like—and invest that money in new companies or ideas they

believe will become commercially successful. The goal is to have the start-up companies either go public (i.e., sell shares of their stock to the public) or be acquired (bought) by another company so that the venture capital (VC) firm can pay back the institutional investors who provided the “seed” money and also make a little profit for themselves.

Given the unpredictability of the business world, it’s no surprise that these investments are essentially high-stakes gambles by VC firms. The NVCA estimates that 40 percent of companies that receive venture capital fail, and a similar share produce only “moderate” returns (NVCA 2012). Only about one in every five investments produces significant profits, and it is these returns that make it possible for the venture capital industry to consistently perform better than the public markets.

While making money is certainly important to venture capitalists, the highest ideal in this particular industry is to drive job creation, economic growth and technological advancement by giving a “leg up” to entrepreneurs and helping them turn their bright ideas into products and services that influence our everyday lives. Since 1970, VC firms have invested more than \$450 billion in 27,000-plus start-up companies (NVCA 2011), the most famous of which include Google, Microsoft, FedEx, Apple, eBay, Intel and Facebook.

## Researching the Deal

So, where do librarians fit into all of this? Well, given that the average venture capital investment is around \$7 or \$8 million (though investments of \$30 to \$50 million are not uncommon), venture capitalists don’t just throw their money at every start-up idea that happens to walk in the door. Vetting, or “due diligence,” is crucial to the success of a VC firm. And while it is best to let those with investing experience pore over the financial statements, the research skills required to sort through the various markets, companies, technologies, regulatory issues and individuals related

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to a potential deal are perfectly suited to the modern information professional.

I should know—I am a research analyst for a top-ranked VC firm in Texas. I don't have a business degree, but I do have a library degree, not to mention a passion for competitive intelligence and a time-honed knack for unearthing the kind of deeply buried information—especially information about private companies, which tends to live under the radar if it lives anywhere at all—that is invaluable to a venture capitalist. And although the world of investing was outside my comfort zone coming into this job (my background is in library science and journalism), I've also learned more than I ever imagined about the ins and outs of successful companies and investments. These days, I can even look at a balance sheet and make some sense of it.

At my firm, I work with another MLIS-degreed research analyst to provide research support to roughly 25 investment professionals. We also offer services to the companies in our portfolio and to our “CEOs in residence” (my firm partners with proven, entrepreneurial CEOs to pursue value creation opportunities in segments of mutual interest), as well as to entities or individuals closely related to the firm. Essentially, we act as reference librarians to the firm and its extended family, with the key difference being that we tend to simply provide the information they are seeking rather than showing them how to find it themselves. In addition, we perform a good deal of synthesis on the data we dig up, both to help clients make more sense of it and to more quickly point them in the direction of an answer.

Inquiries typically come to us through e-mail, though some are made in person or presented over the phone. The next step is often a reply that can take the form of everything from a brief narrative to relevant data points to a selection of materials related to the query subject. Sometimes the other research analyst and I will have the opportunity to use the reference interview skills we learned in library school.

The inquiries run the gamut, from the

typical “tell me how big this market is” and “tell me as much about this company as you can” types of queries to personal background checks, searches for CEO e-mail addresses, competitive landscape overviews, news runs, patent searches, trading comparables, acquisition comparables, demographic information, funding data and growth projections—all of them deadline-driven and highly confidential. It goes without saying that you wear many hats in a job like this, but the underlying goal is the same: to deliver a successful customer service interaction to our particular group of users, the investment professionals.

To facilitate our research, we use a number of proprietary databases, including the following:

- Financial data and analytics providers like Capital IQ and Thomson One;
- Equity research portals such as TheMarkets.com (recently acquired by Capital IQ);
- Independent research providers, including IDC, Frost & Sullivan and eMarketer; and
- News sources such as *The Wall Street Journal*, Factiva and the business journals.

We also rely on specialized services like Morningstar Document Research and Guidestar, financial- and technology-specific news sources such as TheDeal.com and GigaOM, legal research services like Westlaw and PACER, federal government databases (including American FactFinder and the Bureau of Labor Statistics), and publicly available search engines like Google and Bing. We occasionally reference print publications along the lines of *Venture Capital Journal* and *Private Equity Analyst*, but 98 percent or more of our research is conducted on the Internet.

### Reverse Engineering

That said, it's not always simply a matter of fielding an inquiry, performing a

search, and then delivering the answer. On a daily basis, we encounter any number of challenges and obstacles that require us to lean on the skills we've accumulated during our careers as research professionals. Chief among these is the fact that sometimes the information a person is seeking simply does not exist, at least not in the form he or she desires—or perhaps it does, but only as part of a report that costs somewhere in the five-figure range and isn't important enough in the grand scheme of things to purchase.

While obstacles like these can be frustrating, they can also inspire the development and implementation of creative search strategies that can sometimes lead us to a piece of proprietary research hidden in the “deep Web” or to an alternative data point that can be manipulated to reveal the answer a user is seeking. The ability to “reverse engineer” is an extremely valuable (if difficult to articulate) skill to have in a job like this one, as is the ability to recognize patterns, especially when we're trying to piece together the storyline of a particular company or deal.

Reverse engineering, for instance, can come into play if we're searching for information about a private company and finding little of substance. By examining the company's business registration or taking a look at the WHOIS record for its URL, we can sometimes identify either the company's former name or actual name, which often occurs when a firm is using a public-facing moniker named for a flagship product. This approach can also identify principals associated with the company and, in turn, supply us with a bunch of new search keywords. From there, it's a matter of harvesting information and working back toward the present to provide context around “who” the company is and how and why and with whom it does what it does now.

If we've been charged with unearthing the details of the acquisition of a company by either a private equity firm or a corporation, looking for patterns or interesting coincidences can help us find the answer or at least obtain enough

information about the transaction to make some solid inferences about it. For example, if the deal is not showing up in the standard financial databases, it's possible the acquisition was part of a "roll-up," a practice whereby a private equity firm buys multiple companies in the same industry and "rolls" them up together into a single, larger company. These transactions are sometimes hidden from view, especially when a recently-acquired company makes an acquisition of its own, a transaction that has undoubtedly been funded by its new parent company.

Armed with what we know of other similarly timed acquisitions, we might notice that the LinkedIn profiles of employees of a known-to-be-acquired company show them to be working simultaneously for both that entity and the company whose acquisition details we're seeking. It's also possible that we might discover separate news stories about both companies and their plans

to relocate their headquarters to the same city. Our research might even lead us to other companies that appear as though they could be involved in the same roll-up, providing us with information that allows us to draw some reasonable conclusions about the acquisition of the company we were researching in the first place.

Of course, there is tedium in this job as well. For example, filling in the cells on a giant spreadsheet to build out a market map or contact matrix is probably not at the top of anyone's list of good times. Like the more engaging assignments, however, it is something that needs to be done to contribute to the firm's mission and, hopefully, its continued success.

Looking back on my days as an MLIS student, I can't say it ever occurred to me to put my new and developing skills to work in the financial industry. Back then, I was on track to be a news librarian, which felt like a sensible path

for me given my prior experience as a journalist. A chance meeting opened up a whole new world of possibilities and provided me with a new context in which to apply a set of skills I'd been developing. It's a venture that has proven successful and reinforced the notion that a background in library and information science can indeed give an individual the professional capital he or she needs to get a "leg up" in the business world. **SLA**

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# Time to Consider 2020?

Children who graduate from high school in 2020 will benefit from technologies and trends that are still in their infancy today.

BY STEPHEN ABRAM, MLS

I am writing this column on the first day of school in my hometown of Toronto. My wife, Stephanie, has headed off to school to meet her class of 25 young boys aged 9 and 10.

On Labor Day weekend, we often discuss her new class and her philosophies before the start of the new school year. I love one philosophy the best—every day is a new day, and every year is a new start. She needs to repeat this almost daily to someone in her class, but it works for adults, too!

Stephanie's 2012-2013 edition of grade fours were mostly born in 2002 and 2003. They will be graduating from high school in 2020, and most will enter college and graduate by 2025. I believe that during this time horizon, these kids will see and adapt to more changes in the spaces inherent to the library value proposition than any other generation in history. We'll be there, too!

This set me to wondering: What trendy stuff are we seeing today that will just be normal in their young lives? And what interesting stuff will be normal in their workplace experience?

## The Norm for 2020

In these closing days of 2012, we're

already at the point where the things in the list below are the norm for most companies:

- Employee social networking;
- Active monitoring of company reputation on social networks;
- E-learning for staff;
- Staff training and development strategies;
- Electronic in-house communication vehicles (blogs, Yammer, discussion lists, Twitter, etc.);
- Mobile strategies for content and communication;
- Quality digital resources of both internal and external content; and
- Private content and personal networks behind intranet or firewall barriers.

Indeed, most librarians contributed to these strategies and continue to grow in that direction. If your employer doesn't have most of these tools and strategies, engage your SLA colleagues as you prepare to point your organization in the right direction or change your position.

Looking ahead, here's some stuff that

I think will be the norm in those 2020 high school grads' lives:

**By 2020, the library will be everywhere.** By *everywhere*, I mean well beyond the 20th century building and well beyond the pocket device. Current trends in 2012 around geo-location, access, apps, augmented reality, and e-learning will reach fruition quickly, and the information experience around the question, decision-making and learning spaces will be very, very different. This has been the inexorable destination since the first Internet Big Bang.

What are the real pressures here—not in terms of technological change, but behavioral change? Workers, executives, organizations and learners will adapt in non-uniform ways and at different speeds. This will be driven not just by demographics, but also by individual preferences and stressors for change. By 2020, though, the vast majority of people will have adapted to the new environment in many ways.

No one will be under more pressure than librarians and associated information professionals. The librarian will need to be *somewhere* and *everywhere*—both virtual and physical. Access to a librarian for advice and assistance will be at the point of need more ubiquitously. Some of this access will be Siri-like and automated, and some will be a hybrid of predictive sources (think LibGuides on steroids), and it will always include passive availability as needed. The big change for librarians will be an expectation for 24/7/365 availability.

Embedded librarianship will increase in importance, and special librarians will be far more mobile, interpersonal, and independent of their collections. Parallel to that, they will need access to spaces that support their core strategies—consultation, advising, training, and content and experience development. Consequently, we will see

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a radical reinvention and re-imagining of what physical space means in the information context. Rather than being dominated by collections, library physical spaces will serve as program spaces for research, collaboration, creation, and training.

In academia especially, the changes will be profound. Libraries will create and offer more engaging experiences to complement the still-vital classroom experience. Gaming, video, audio, access to extended learning, primary and secondary sources, assessment tools, and other digital experiences will combine to create a more complex and effective learning and collaboration environment for players in the research and learning worlds. Excitingly, the personal learning environments and classroom-based cohort learning systems will contain access to experts—expert teachers, expert librarians, subject matter experts, and celebrity guests from zookeepers to scientists to astronauts. Rock star librarians will be in demand across organizational boundaries.

**By 2020, content in special libraries will mostly be digital in format.** That said, the evolutionary phase where the consumer Web experience drove *search* and *find* will have fragmented. Simple search will no longer be sufficient for decision support—in 2020, the creation of an experience that delivers on the user's goals is more important. Librarians now primarily serve as strong team contributors to core knowledge strategies on two fronts: (1) on the content and information experience development front in content filtering, selection, acquisition, organization, description, metadata, customized taxonomies, and experience portal and e-learning development; and (2) on managing the information and knowledge ecology by providing advanced, “professional” search for key questions and projects, consulting and advising on information project parameters, training in information fluency skills and competencies, developing information policy, and developing, monitoring, and implementing policies on information ethics, licensing, confidentiality, privacy

and copyright use, and so on.

The digitization of collections continues in 2020, but the definition of *collection* has stretched to more completely include both internal and external information. As well, the concept of “the collection” has evolved from an inventory of great content aligned with organizational, research, or learning goals to one where on-demand access to everything dominates, and the challenge is to develop advanced information fluency skills that match enterprise mission-critical goals. Format expectations have fully moved from physical books, magazines, CDs, and DVDs to a hybrid environment where a matrix of choices abounds (but where digital content is by far the dominant format). New communication modes, from e-mail through texting to e-learning and social collaboration software, have stretched the boundaries of what it means to teach, answer and relate to users and for users to relate to each other.

Outside the library, digital access to content and service has changed materially. Access speed and distribution have increased dramatically, and relative costs have dropped. The access divide between home, work, classroom and library has largely been mitigated. Household access to the Web offers more options for telework, as inexpensive mobile tablets and shared access tools (through libraries) offer three key opportunities and value propositions: (1) access to professional assistance and training; (2) access to community-based resources such as quality databases, private intranet content and teams, shared devices like 3-D printing, Espresso Book Machines, creativity services, holographic outputs and experiences; and (3) collaborative learning experiences chosen by employers and by end users themselves.

**By 2020, devices will have moved from being mostly space dependent (e.g., desktop computers, home phones, movie screens, televisions, and radios) to one where the user can be infinitely, confusingly, riskily and personally available.** Everyone's devices will know when they're at work, on campus, at home, or

at the mall and will adjust their interface to fit that context. They will also track and update the individual user's profile, preferences and choices.

Personal devices were the major shift of the past decade, in that the home computer/home phone and workplace desktop/work landline were essentially shared resources. At first, this drew business attention for more targeted advertising, but the real change was in personalized, geo-located advice, services and recommendations. By 2020, this trend will be moderating every experience based on our personal activities, profile, and location.

The explosion in digital devices will cause security issues, and librarians will emerge as key advisors on the risks and opportunities of managing digital identities and ensuring that business secrets remain secret. Today's geo-located digital couponing is just the start, and this kind of personalized recommendation will move into the content space quickly, first with entertainment and then with targeted research and workplace interests.

**In 2020, the divide between entertainment and the learning, research and answer space is clearer.** There is a growing understanding of the difference between consumer-oriented, entertainment-based collections, such as fiction, video and music, and collections of non-fiction, podcasts, and digital learning objects that support research, learning, decision-making, discovery and invention. A critical mass of historical, out-of-copyright content has been converted to digital format, but current information about key topics like business, medicine, and the law is also fully digital and ubiquitously available to targeted users. Most importantly, an enterprise's internal information is also digital and synchronously, seamlessly, and securely accessible.

Most of the barriers to in-copyright content, such as digital rights management, pay walls, and licensing rules and regulations, have been addressed on an international basis. While not all parties are fully satisfied, there is now a global legal platform for economic success



and access. Librarians are recognized as key partners in effective information use and exploitation for competitive and personal advantage.

**By 2020, consumer search will have gone through a sea change.** Google will continue to be a player in the search space as part of other environments that deliver a more transformative experience. However, those experience spaces will now be a mosaic of options driven by pioneers like Amazon, Facebook, Twitter, Blackboard, and Apple as well as traditional publishers and vendors (they evolved!) and surprising new entrants from the fringes.

While search engines will still offer traditional results lists, they will have significantly more dimensions, such as visual responses (like today's word clouds), added search suggestions, and non-textual resources that offer exciting additional options as end-user choices. Search results in all spaces will offer access to integrated content results in contexts that extend beyond Websites and include books, articles, graphics, streaming media, podcasts, videos, education objects, and more.

With a plethora of search engines available, many librarians will focus on endowing information users with the competencies to choose the resources they need depending on the context of their question and the ultimate decision being made. End users will be taught to understand the difference between tacit (know how) and explicit (know that) knowledge and information and to proactively ask for advice or choose appropriate consumer or professional search engines. Options will have expanded beyond the consumer search core, and there will be a mosaic of choices for both professionals and consumers—quality search, visual search, multilingual search, suggestion systems, visual taxonomic search, and sentiment search.

**Payment systems will undergo some of the most extreme changes.** More and more users will be demanding to make their own purchasing decisions, thereby challenging 20th century budgeting systems. By 2020, cash and

checks will have become a tiny part of the payment system; we will be seeing a more dynamic system of payments and micropayments, with the mobile device playing a large role through the use of peripherals such as loyalty cards and through the full emergence of near field communication (NFC) payments.

Purchasing systems within HTML5 and in applications will spread wildly and include cloud databases of documents, books, articles, music, films, games, and retail. Librarians will be challenged to endow end users and align enterprise systems with the competencies and strategies to safely and cost-effectively make choices about payment and seamless payment systems.

**By 2020, virtual communication tools will have evolved into more proactive and integrated services that are embedded into user learning, research, and project virtual spaces and have personal branding, relationship marketing, and reputation management features.** In 2012, virtual communication is too disaggregated, with too many choices. Just look at the average librarian's signature file, with its e-mail addresses, phone numbers, handles and social networks. Too often, these end up as focused, one-on-one destination services that a user must choose to take advantage of and that have high rates of failure.

By 2020, social networks will have evolved to more accurately reflect your specific relationships with your network—your teammates, work colleagues, fellow SLA members, classmates, relatives, colleagues, and so on. We are already starting to see this (in an automated fashion) in the latest versions of Facebook and Google+. The core of these services is their filters and the levels of trust you hold in your various circles of contacts.

As evidenced by Facebook's acquisition of Instagram and Google's attempts at a social strategy, we are more than likely to see major acquisitions and developments in the social networking space to drive a more integrated, narrower, and more trustworthy environment. The major change will be

the integration of private, cohort-based team, workplace, and project social networks that address the weaknesses of advertising-based consumer networks.

There will also be advanced, secure, private social networks that are a requirement of employment in most workplaces. This will challenge our library strategies for supporting research, learning cohorts, and teams and answering individual questions. Those libraries that jumped on the bandwagon early and evolved with their learner populations thrived more quickly.

**In 2020, the library will be evaluated less on its spaces and collections—it will be difficult for one library to be much better than another in a digital world—and more on its people, professional services and programming.** For example, programming at libraries will vastly increase as part of a strategy to sustainably and scalably develop, acquire or license virtual programming aimed at helping organizations adapt and continuously learn. The mandate to support learning and the availability of cost-effective courses and e-learning technologies will drive library strategies in programming. Many libraries will begin to offer internal and accredited courses that lead to degrees, certificates and diplomas.

A key service of librarians in 2020 will be the personal information consultation—a service more far-reaching than traditional transactional reference and one-on-one and class training, and based in the offer of transformational advice and training underpinned by good research and content. Another key service will be content curation. Researchers in academia and the enterprise will still acquire and collect, but they will need curation skills so they can manage their personal content collections and use both personal and shared taxonomies and other tools for shared and personal access. Content stars, some of whom are librarians, are already emerging in 2012 as great curators in different fields.

*Continued on page 33*

# Making Good First Impressions

Your initial experiences with customers, vendors and other units in your organization can help you improve your own interactions with clients.

BY JILL STRAND, MLIS

My staff and I went through an experience recently that prompted us to think about first impressions. We were working with a new vendor to implement a suite of software tools in our law firm. Different tools are geared for different tasks and types of users (attorneys, paralegals, secretaries, and so on), so there was quite a bit for us to coordinate, such as providing access to, and training for, each tool, arranging the pilot testing, and developing a roll-out schedule.

Needless to say, we learned a lot from the experience. So, whether you work for a vendor or serve library patrons directly, here are some ideas to help you make a strong first impression.

**Make a list and check it twice.** We knew there would be hiccups, but it seemed that a fair number of them were due to things we thought the vendor could have clarified or brought to our attention earlier in the process. While our local vendor representatives were fantastic and quick to respond to questions, it seemed like someone at a higher organizational level could have designed a checklist for us in advance. Such a list would have outlined all of our options and helped us focus on decisions we needed to make, and

steps to take, before implementation (in fact, each product or tool could have had its own checklist). This approach would be a great way for a vendor to set expectations and ensure that its library clients don't miss anything—and it would make the vendor's reps look like rock stars when new products are launched successfully!

This experience got me to thinking about the first impression our library makes on new attorneys and staff coming into the firm. We maintain checklists (based on employees' roles) of things we must do in advance, such as requesting login information for software they will use, creating patron records in our catalog, and scheduling additional training with vendor reps on other resources.

**Set the stage for that first encounter.** This may sound almost too basic, but sometimes it's the little things that stick in people's minds. Consider the following:

- When you plan trainings and orientations, make sure you reserve a room and the necessary equipment to minimize delays and technical glitches.

- Load the software you want to demonstrate onto the computers in the training room (and/or the user's computer). Give your IT Department plenty of lead time so they aren't trying to get everything up and running at the last minute.
- Tailor the orientation to the audience's needs. For example, we have attorneys in a variety of practice areas, so their training sessions may focus on selected resources.
- Provide handouts (whether hard copy or online) so trainees don't feel pressured to take notes and instead can focus on the presentation.

**Make things idiot-proof.** Lest you think I'm insulting everyone's intelligence, I came up with this phrase to describe the many times I've had difficulty trying to figure something out. In my mind, making something idiot-proof means going beyond being user-friendly and actually trying to make it so simple that barely any thinking is required to figure out the next step. As I mentioned earlier, the library at my law firm prepares an orientation packet that has all the basic (as well as some more detailed) information new employees will need to get started. We don't expect them to remember (or even read) the entire packet, but it is a resource they can turn to if a librarian is not immediately available.

Here's another example: Given the number of overlapping tasks and user types for the suite of software tools provided by our new vendor, we decided to create a chart that shows what each tool can do and the tasks (and users) for which it is best suited. This has already helped many employees figure out which tool will work best for what



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they're trying to accomplish.

**Speak a common language.** While setting up our new e-tools, we sometimes struggled to understand what the vendor reps were saying or doing in certain situations. This resulted from “vendor speak,” the language vendors use with their co-workers to describe some items or processes.

Why not include a glossary of terms in the checklist to help customers translate vendor speak into terms they can understand? This could go a long way toward improving communication and efficiency. (By the same token, librarians often have their own language that confuses the average user. Instead of saying *OPAC*, call it a *catalog* or *title database*. Rather than *processing an interlibrary loan*, say you're *borrowing a resource*. I'm a big fan of using plain English, particularly since I spend a lot of time reading statutes and legal treatises.)

**Follow up and get feedback.** (Note: This section strays a bit from first to “early” impressions, but it is still important.) Keep in mind that while there are some things people need to know

**You want to make your clients feel confident in your ability to help them in a timely fashion with minimum hurdles.**

right away when they start a job, it can be difficult to absorb everything that's presented in an initial orientation. New employees at my firm often need some time to learn the details of the projects they'll be working on and what kind of help they'll need from the library. Thus, while we include more information in the orientation packet than they may need initially, we also try to check back a week or two later to see if they have any specific questions or research needs.

In one instance, a new attorney had asked about options available for free case law searching. Members of the Minnesota Bar Association (MBA) have access to Fastcase at no cost, but she had not changed her online account with MBA since moving to our firm. I showed her how to request the change

online and followed up a week later to see if she needed any help. Once she had updated her account information, I was able to help her add it to our password management system. Now she can simply go to our research portal, click on Fastcase, and begin conducting research.

There are many more ways to make a good first impression than I have discussed here, but I hope this article will prompt you to think of some of your own to share. As it turned out, our vendor rep liked the checklist idea and even moved it up the food chain to her boss. Whatever the nature of your organization or role, you want to make your clients feel confident in your ability to help them in a timely fashion with minimum hurdles. **SLA**

## Info Tech

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### Innovations with Potential

That's how I see work environments in 2020. Change is happening ever more quickly and will speed up again this decade. That said, there's a ton of innovation taking place that, while interesting, will take longer to reach the scale needed to affect global markets and the international workplace. Here's some of the stuff I think won't be fully developed by 2020 but shows exciting potential:

**Augmented reality glasses.** These scare me. I think of people dying while texting and driving, and I don't trust humans to use these well, even when walking! That said, I think they'll have several niche market uses, appearing in entertainment, museum, and gaming spaces by 2020.

The “**Internet of Things**” will have started, but in 2020 it'll still be the purview of wealthier classes. Using a toaster, microwave, oven, or light bulb remotely from my smartphone doesn't turn my crank. I see a greater role for this technology as part of smart homes, smart classrooms, smart meeting spaces, and smart offices to ensure that energy costs are managed better.

Research on **self-driving cars and air-planes** is exciting. Toronto's new streetcars and subway trains are already ready for drone drivers, and most planes are flown by wire today. But I doubt this technology will be fully out there in the next decade.

**Artificial intelligence in computing** will grow, but I won't trust it for awhile. IBM's Watson, Apple's Siri, and Google's rumored Android assistant are fun and interesting, and they may offer some exciting opportunities for retrieval within the decade. However, I worry about the

alignment with ethical, moral, and value-based decision making in research. I still value the human factor in this part of search. A tool is just a tool—it can build a concentration camp or a cathedral. I don't think AI will be ready to align with real research purposes any time soon, but it may prove to be useful for narrower purposes.

The continuing experiments in the **gamification of learning experience** and the **creation of immersive instruction and collaboration spaces** (like Second Life) will show promise in 2020 and bear watching. I don't think they'll emerge in any substantive way beyond the entertainment space quite so soon.

**Good translation engines** will still not be acceptable to professional translators, but will be OK for search and some purposes.

So, there you have some ideas and thoughts for the end of a hot summer. Happy new year! **SLA**

# Changes in Canadian Copyright Law

Significant changes are being made to Canada's Copyright Act, and information professionals should start preparing now for their impact.

BY LESLEY ELLEN HARRIS

Canada's Copyright Act has been in force since 1924 and has never been overhauled or replaced by a newer statute. After trying for 15 years to revise the law (and debating three bills that were never passed), the Parliament of Canada approved major amendments to the Copyright Act earlier this year. Most of these amendments will likely take effect in the next several weeks.

The changes are complex and controversial, and librarians, educators, publishers, and lawyers are examining them to see how they will affect the information profession and its clients. This article provides an overview of the major Copyright Act amendments.

## Impact on Content Consumers

*Consumers* refers to anyone who "consumes" content, including individuals, students, researchers, educators and librarians. The amendments benefit consumers by expanding the list of fair dealing purposes in the Canadian Copyright Act—currently criticism, review, news reporting, private study and research—to include education, parody and satire.

In addition to fair dealing, there are new exceptions for specific consumers. For example, the amendments permit an educational institution, for

educational or training purposes, to use online content that is freely available. The source of the content must be mentioned, and the exception does not apply if the work is protected by technological measures that restrict access to it. This exception also does not apply if "a clearly visible notice—and not merely the copyright symbol" prohibiting the use of the content is posted on the work itself or on the Internet site where the work is located.

The amendments permit libraries, archives and museums (LAMs) to digitize and copy material in an alternative format if there is danger of the original format becoming obsolete. LAMs are also able to make interlibrary loans in a digital format.

Under the amendments, individuals are permitted to use protected works to create a new work (such as a mash-up) and to disseminate that work—for example, by posting it online on a site such as YouTube or Vimeo. This exception only applies to content that is published or made available to the public and created solely for non-commercial purposes, meaning there is no intent to exploit or potentially exploit the existing work. Although many refer to this provision as the "YouTube exception," its scope is much broader and is not

limited to digital or online uses.

Private reproductions are permitted by the amendments so that individuals can perform activities such as time-shifting, format shifting, and creating back-up copies of content to protect against damage or loss. For example, an individual may time-shift a recording of a television program so he or she can watch it at a more convenient time. The program must be legally accessed, only one copy may be made, the copy may be kept only long enough to listen to or view it at a more convenient time, and the recording may not be given away. Also, an individual may copy music he or she legally owns onto a computer, iPod or MP3 player, thereby format-shifting.

Under the amendments, statutory damages will distinguish between commercial and non-commercial infringement; non-commercial infringement will be capped at \$5,000 CDN. Damages for commercial penalties have not been changed and are \$500 - \$20,000 CDN per infringing act.

## Impact on Content Owners

Thanks to the amendments, content owners (such as authors and publishers) can look forward to the following changes:

- The act will explicitly state that those who use online copyright-protected content without obtaining the owner's permission will be infringing copyright.
- Persons who circumvent digital rights management (DRM) systems



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or procedures to access or copy content will be subject to civil and criminal penalties unless their efforts are for certain purposes, such as encryption research, personal information protection, and reverse engineering for software compatibility. An example of a DRM system or procedure is a journal with password-protected access or encrypted contents.

- The amendments prohibit removing or tampering with copyright information on works (also called rights management information, or RMI.) RMI encompasses any information that identifies a copyright owner and information relating to his or her work. RMI could be an e-book with a copyright symbol and the author's name, or an image with a digital watermark.

These three changes will make Canada eligible to join two digital copyright treaties, the WIPO Copyright Treaty and the WIPO Performance and Phonograms Treaty, both of which are under the auspices of the World Intellectual Property Organization. They will also align Canada's copyright laws with those of many of her trading partners.

Another significant change is that photographers will now be the first owner of copyright in their photographs, even in the case of commissioned photographs. This change does not apply, however, to a photograph or portrait that was commissioned by an individual for personal purposes and for consideration such as money. For example, if you commission wedding photos, you may use them for private or non-commercial purposes without obtaining permission.

## Impact on ISPs

There are new exceptions for Internet service providers (ISPs) that limit their liability when they act as an intermediary in communication, hosting and caching activities. In addition, the amendments establish a "notice and notice" system: if content owners notify Internet service providers of allegedly infringing content,

the ISP must send this notice to the person identified as posting the content or the ISP will be subject to statutory damages between \$5,000 and \$10,000 CDN. This approach is in contrast to the "notice and takedown" system in the U.S. Digital Millennium Copyright Act, which requires the ISP to immediately block access when notified by a content owner of allegedly infringing content.

## Review Every Five Years

The wording in the Copyright Modernization Act and the scope of the provisions will be subject to much legal interpretation in the coming years. In addition, a committee of the Canadian Senate or the House of Commons (or both) must review the act five years after it comes into force and every five years thereafter, so it will not be long before we hear about the effectiveness of these major amendments.

To learn more about the Copyright Modernization Act, visit [www.parl.gc.ca/content/hoc/Bills/411/Government/C-11/C-11\\_4/C-11\\_4.PDF](http://www.parl.gc.ca/content/hoc/Bills/411/Government/C-11/C-11_4/C-11_4.PDF). **SLA**



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**NOVEMBER 2012**

**Health Science Librarians of Illinois**  
Resurrection Medical Center  
Chicago, Illinois, USA  
1-2

**DECEMBER 2012**

**Military Libraries Workshop**  
Military Libraries Division of SLA  
Albuquerque, N.M., USA  
3-7

**FEBRUARY 2013**

**SLA Leadership Summit**  
Crowne Plaza Downtown  
Dallas, Texas, USA  
6-9

**JUNE 2013**

**SLA Annual Conference & INFO-EXPO**  
San Diego, Calif. USA  
9-11

**4th Information: Interactions and Impact (i<sup>3</sup>) Conference**  
Robert Gordon University  
Aberdeen, Scotland, UK  
25-28

**9-11 JUNE 2013**

**SLA Annual Conference & INFO-EXPO**  
San Diego, California, USA

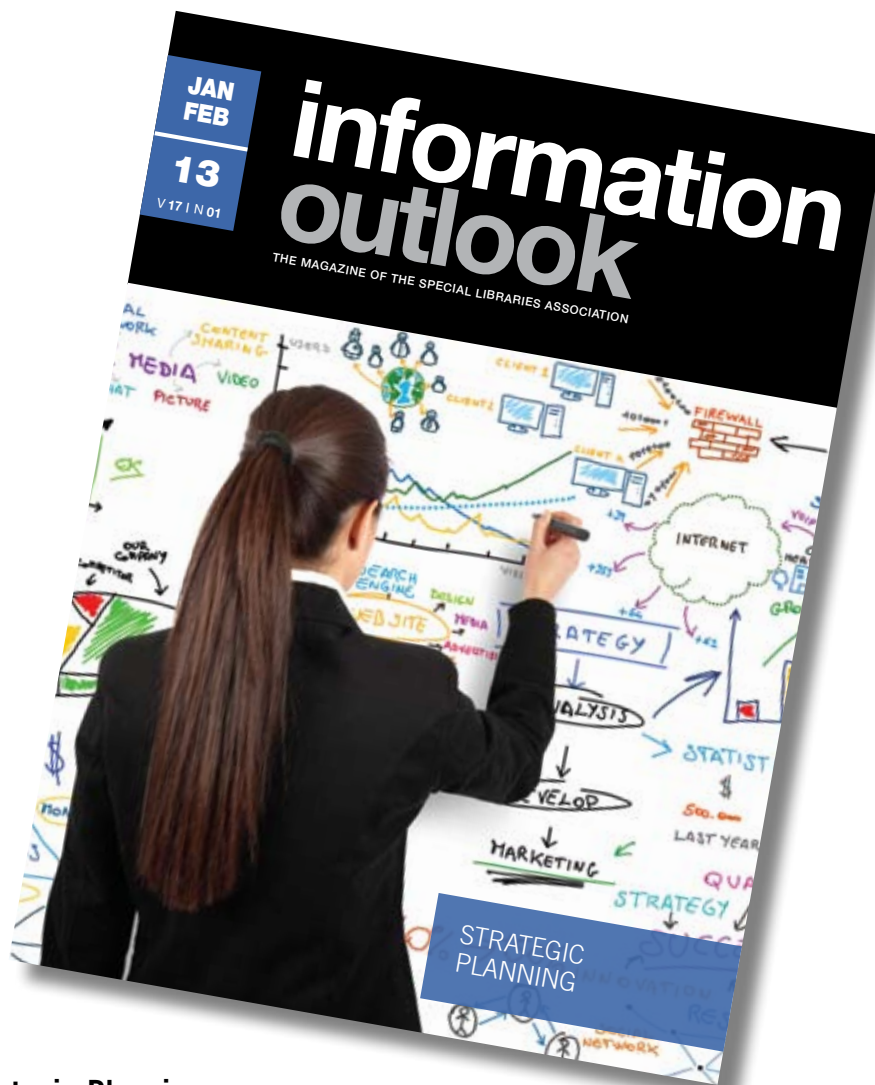
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- How do I develop a strategic plan for my library or information center?
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