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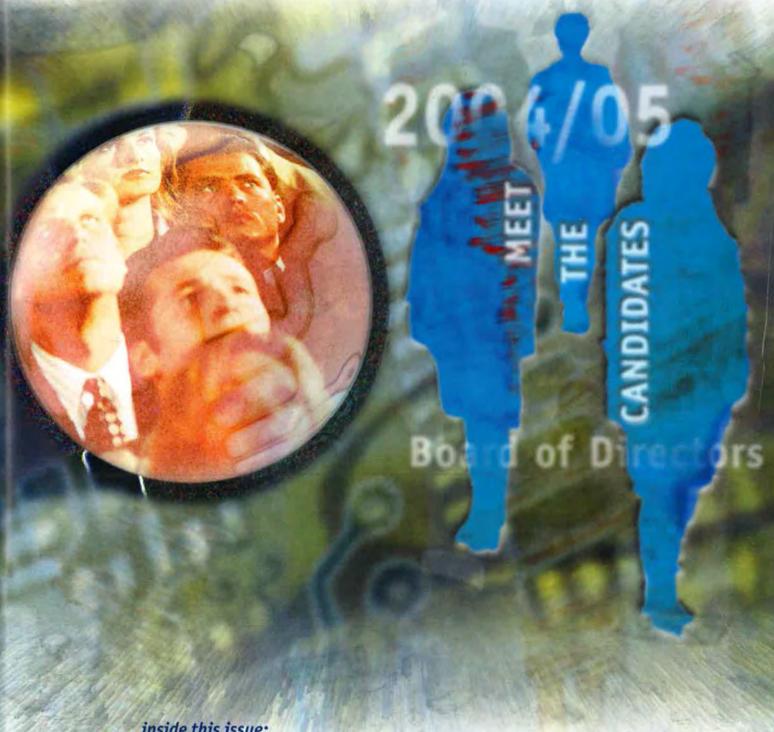Follow this and additional works at: https://scholarworks.sjsu.edu/sla_io_2004

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executive outlook

Participate!
Participate by Voting.

I've been looking for a notable quote about voting to start off this column and the most relevant one I located is from my 10-year-old neighbor when he asked, "Why not vote?" I agree, why not vote? The reason why I'm bringing up this topic is that you will receive or have already received your ballots listing the candidates for next year's board.

I was fast approaching 18 years old when the United States was deep into the Vietnam War, drafting many 18-year-olds to various branches of the military. I couldn't understand why an 18-year-old was given so much responsibility but not allowed to vote. I also remember the elation and profound sense of duty I felt when the voting age was changed to 18 and I voted for the first time. I still get that same feeling every time I vote in all types of elections.

Every election is an opportunity to influence and change the direction of an organization and SLA is no different. By choosing to vote, you are part of the selection process for identifying our next batch of leaders.

Don't know anything about the candidates? There are myriad ways to find out more about them. The January issue of *Information Outlook* has quite a bit of information about each person. Check out the SLA website (www.sla.org) for the candidates' detailed biographies. Read the candidates' responses to the three questions that were posed to each of them. Everyone has spent time thinking about their responses and has written thoughtful statements. (I remember agonizing over my responses, trying to write succinctly and completely about my point of view.)

Still don't know enough about the candidates and want more? Feel free to ask the candidates – via email – your questions.

Our chapter and division leaders will be hearing the candidates' speeches during the Leadership Summit this month. Ask your unit leaders for their reactions to the speeches. You will be able to read the text of the speeches on our website.

Each year the two third-year Board Directors select a Nominating Committee. I would like to thank the 2004 Nominating Committee, chaired by Sandy Spurlock. Thank you to the members, Judy Field, Carol Ginsburg, Eleanor MacLean, Tom Clark and Linda Broussard. They spend a lot of time over several months identifying possible candidates to provide the necessary leadership for the upcoming years. They look for a variety of skills, experience and diversity of perspective. They also discuss the roles and responsibilities of the positions with the possible candidates. I would also like to acknowledge and thank everyone who considered being a candidate and continuing their volunteer efforts at this unique association level position.

And most of all, thanks to all of you who have voted or are going to vote. Your vote counts.

As my young neighbor asked, "Why not vote?"

Signing off – and going voting,

Cindy Hill

President, Special Libraries Association

making news

sla news

SLA Adopts New Vision, Mission, and Core Values

SLA's Board of Directors unanimously adopted new Vision, Mission, and Values statements during the fall board meeting in October 2003. Created by the Strategic Planning Committee with input from thousands of leaders and members, the new vision, mission, and core values are at the hub of the Association's strategic branding initiative. They are based on the values that shape and inspire SLA's operations and clearly articulate its purpose and desired state.

Our Vision: The Special Libraries Association is the global organization for innovative information professionals and their strategic partners.

Our Mission: The Special Libraries Association promotes and strengthens its members through learning, advocacy, and networking initiatives.

Our Core Values:
Leadership: Strengthening our roles as information leaders in our organizations and in our communities, including shaping information policy.

Service: Responding to our clients' needs, adding qualitative and quantitative value to information services and products.

Innovation and Continuous Learning: Embracing innovative solutions for the enhancement of services and intellectual advancement within the profession.

Results and Accountability: Delivering measurable results in the information economy and our organizations. The Association and its members are expected to operate with the highest level of ethics and honesty.

Collaboration and Partnering: Providing opportunities to meet, communicate, collaborate, and partner within the information industry and the business community.

"The vision and mission statements bring a new perspective and focus to the way the Association will be operated in the future," remarked SLA Executive Director Janice R. Lachance. "Having these securely in place, we have taken a bold step forward, positioning ourselves as a leading organization of global information professionals who are interested in advancing their careers."

chapter &division news

Washington, D.C. Chapter Publishes New Directory

The Washington, D.C. Chapter of SLA, in collaboration with the District of Columbia Library Association and the Law Librarians' Society of Washington, D.C., has published the third edition of the acclaimed Washington Area Library Directory. The directory provides location, key staff, subject collection, public service, and interlibrary loan information for hundreds of the capital region's renowned libraries and information centers. The lead editorial team–DC/SLA members Eileen Deegan, Amy Pass, Michael Kolakowski (representing DCLA), and LLSDC's Judith Weiss–produced the directory with the assistance of numerous volunteers. More information about the Washington Area Library Directory is available via the DC/SLA website at www.sla.org/chapter/cdc/. Copies of the directory can be ordered online at www.arealibraries.com.

Central Ohio Chapter Celebrates Anniversary

The Central Ohio Chapter of the Special Libraries Association celebrated its 40th anniversary on Wednesday evening, November 12, 2003. The festive event was held in the lobby of Online Computer Library Center (OCLC) in Dublin, where 50 members and guests gathered under trees decorated with lights. After a social hour and buffet dinner, Association President Cynthia Hill spoke to the group about core competencies and working for more collaboration and cooperation within SLA, with other associations, and with our vendors. She then answered questions from the attendees. The evening ended with coffee and dessert.

Cynthia Hill, Larry Olszewski (chapter president), Connie Ostrove (chapter past-president), and Mary Banish (chapter president-elect).

During her day in the Columbus area, President Hill visited the Ohio State University in the morning, where she toured the Science & Engineering Library led by Mary Jo Arnold, engineering librarian, and the College of Business Library and relatively new business complex led by Charles Popovich, head librarian of the Business Library. Lunch with chapter leaders followed. After lunch, she toured the State Library of Ohio with Deputy State Librarian Cynthia McLaughlin. She also met with State Librarian Michael Lucas.

Later in the afternoon, President Hill visited OCLC, touring the corporate library led by head librarian and chapter president Larry Olszewski. Housed in the library are older editions of the Dewey Classification Schedules, and Mr. Olszewski showed President Hill the information contained on the library's intranet pages. President Hill also met with OCLC President Jay Jordan and various other department representatives to give them a sense of where SLA is headed with new Executive Director Janice LaChance. In short, President Hill made the most of her first visit to Ohio!

SLA Social Science and Geography and Map Divisions Merge

SLA's Board of Directors approved the merger of the Social Science and Geography and Map Divisions, honoring the results of a vote by the members of the divisions. The merger effectively dissolves the Geography and Map Division as an independent division and transforms it into fourth section of the Social Science Division.

During SLA's annual meeting in June 2003, both divisions held separate business meetings where they passed a motion to send a formal vote mechanism to all members of both divisions to approve their merger. The voting was closed and tabulated on August 31, 2003, with the following results: approved by the Social Science Division by a vote of 118 to 3 and approved by the Geography and Map Division by a vote of 66 to 8. The conditions voted upon follow:

The Scope Note for the new Geography and Map Section is:
The Geography and Map Section provides a forum for the Social Science Division Members interested in all aspects of the production, procurement, processing, and utilization of geographic and cartographic materials, in particular those in the professions of geography and/or map librarianship. Cartographic products include, but are not limited to, maps, aerial photographs, remote sensing imagery, cartographic data in digital form, and such multidimensional formats as globes, tetrahedrons, and relief maps.

The terms of the merger are as follows:
• The Geography and Map Division (G&M) will become the Geography and Map section of the Social Sciences Division (DSOC).

• The current G&M Division Chair will become the first G&M section chair and will have a position on the Advisory Board with section programming and fundraising responsibilities.

• The G&M Section Web page will be a link from the DSOC Web page. It will remain intact with the exception that any appearance of the word "Division" will be changed to "Section."

• All G&M Division members will be automatically subscribed to the DSOC newsletter, published three times a year, and a portion of the newsletter will be reserved for content especially relevant to G&M Section members. This material will be provided by an editor or sub-editor designated by the G&M section.

• The G&M Section will maintain appointments to CUAS (Cartographic Users Advisory Committee) and the Geography and Map Section of IFLA, International Federation of Library Associations and Institutions.

• Any archival materials generated by the Geography and Map Division prior to the merger will be retained as a discrete collection separate from Social

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Sciences Division's archives. Materials generated after the merger may be retained separately or as part of the Social Science Division archives.

Alignment to the Association's Mission and Vision:
This decision aligns directly with the Association's Mission to provide its members with networking opportunities. This "merger" enables members to seek an appropriate Division to continue the actions of their valuable interests and prevents these members from the continuing struggle to remain a self-sustaining entity.

The opportunity for Geography and Map to join Social Services as a Division also confirms our core values of Results and Accountability, as this "section" will now have the proper infrastructure in which to monitor its activities, document its actions, provide service and programming for its membership, and deliver measurable results.

Association headquarters staff have added all Geography and Map Division members to the Social Science Division and Geography and Map Section of the Division. Current members of the Social Science Division who may also wish to affiliate with the Geography and Map Section may contact Terry-Ann Owen (terry@sla.org or 202-939-3661) to add this affiliation. There is no additional fee for affiliation with a section.

member news

Haake Joins Western New England College
Cristin Haake has been named advancement coordinator in the Office of Development at Western New England College in Springfield, Massachusetts. Haake will be responsible for providing research support for both the director of Advancement Research and the director of Foundation Relations and Planned Giving.

IFLA Appoints new Secretary General
IFLA (the International Federation of Library Associations and Institutions) President Kay Raseroka has announced the appointment of Mr. R. Ramachandran as the new secretary general of IFLA. He will assume the position on April 1, 2004, following the retirement of Ross Shimmon.

Mr. Ramachandran is currently director of the National Library, deputy CEO of the National Library Board in Singapore, and secretary general of the Congress of Southeast Asian Librarians (CONSAL).

AALL Seeks Nominees
The Government Relations Committee of the American Association of Law Libraries (AALL) is soliciting nominations for the 2004 Public Access to Government Information (PAGI) Award. Established in 1999, this award honors significant contributions by people or organizations involved in the protection and promotion of greater public access to government information. Recipients need not be

law librarians or members of AALL, although nominees should have a legal focus. Previous PAGI award winners are as follows:
-2003 Georgia Government Publications jointly with the Virginia Regulatory Town Hall
-2002 FirstGov
-2001 no award
-2000 Thomas (LOC website)
-1999 GPO Access

Selection criteria include a contribution that significantly improves public access to government information, thereby increasing the public's knowledge about the workings of government; the extent to which the individual or organization has had a positive impact on protecting and promoting public access to governmental information; and the extent to which the effort advances the AALL mission and Government Relations Policy.

Further judging criteria are enumerated at http://www.aall-net.org/about/award_information_application.asp.

Though nominations are solicited annually, there is no requirement that the award be given every year.

All nominations are considered on an individual basis, with complete confidentiality. Nominations must be submitted no later than February 2, 2004 to the chair of the Government Relations Committee, Elizabeth LeDoux, Covington & Burling, 1201 Pennsylvania Avenue, Washington, DC 2004-2401, or by e-mail to eledoux@cov.com.

Redesigning the Special Libraries Association Web Site

By John Latham

John Latham is the director of SLA's Knowledge Exchange and can be contacted at KEx@sla.org.

By the end of this month we hope to have launched the redesigned SLA Web site,
which we have changed to better accommodate the needs of SLA members and promote the association worldwide.

History

SLA launched the first version of its Web site in 1996. The home page was redesigned in early 1997 to the one with the purple background, which lasted until October 2000. Keeping the old Web site up-to-date and fresh required many hours of work for the few staff members who knew how to create HTML pages. It became clear that each program area of the association needed the ability to get data to our Web site quickly, efficiently and consistently. The 2000 and current version is a database-driven, custom-developed content management system running on the latest software and hardware. The new system spread the responsibility of posting and maintaining the Web site from a few technical resources to every program area. This enabled the association to be more responsive to the membership. Weaknesses in the design of the software have caused the site to become bulky, difficult to navigate and inaccurate to key-word search.

Although minor amendments were made to improve accessibility to the Web site's resources it became clear from user surveys, discussion list feedback and general comments from the members that it was time for a general overhaul. A 62 percent satisfaction rate in the 2002 Needs Assessment Survey was clearly unacceptable. See the 2002 Needs Assessment Survey Summary at www.sla.org/2002assessment for the full executive summary and link to the survey results.

Redesign process

Not only did we have to consider accessibility to the whole Web site, but also the design of the home page as a promotional tool of the association as a whole. SLA's marketing team took on the task of redesigning the home page and changing the structure of the site. We soon discovered that our current Web site was structured in a manner that reflected the departmental make up of staff at SLA headquarters. So our next step was to bring in a consultant. And who better to consult than our core audience - SLA members. In August 2003, the Web team solicited the help of SLA members to participate in Web focus groups. Getting help from the Washington, DC, area was no problem. But we needed member input from all over, so we expanded the focus groups to include members, non-members and vendors from Boston, Massachusetts, to Christchurch, New Zealand.

Two groups totaling 14 Washington, DC area members came into staff headquarters and worked with us on the structure. We also mailed the same information to about 13 individuals worldwide. The responses were

very interesting as well as helpful in putting together a site with improved navigation.

The ongoing theme that emerged from the focus groups was exactly what we had discovered earlier. The site was arranged in a manner that made finding simple items very difficult. There were a lot of catchy titles for navigation bars, but in the end what did they really mean and what information was contained therein? The focus group participants loved the content; they just had a hard time finding it in the site's present structure.

SLA's Web site had 14 navigation bars on the home page and over 110 sub-navigation bars underneath. Faced with a daunting task, our focus group members carefully went through the exercise looking at each navigation bar and sub-navigation bar evaluating the importance of the content and deciding on the proper location for the information. They offered suggestions on names of navigation bars as well as questioned the necessity of some information.

Based on this valuable input, we now had the direction we needed to implement the overall restructuring.

What's New?

The navigation bars have been reduced to nine from fourteen: About Us, Membership, Events & Conferences, SLA Community, Professional Development, Resources, Job Center, Products/ Publications, and Contact Us. We continue to have drop down bars showing what is included in these seven main sections. Within these sections we have reorganized the content to facilitate access to the great online resources available.

We are also introducing some new features that will improve your overall experience while navigating through www.sla.org. Here's what the enhancements to association Web site will mean for you.

Accessing the Member's Only Section

You will no longer have to remember your PIN as the new website allows you to set your own password for the member only resources. In addition you will now be able

to save a cookie to your computer to have instant access to members only resources each time you visit the site.

General Access

In addition to reorganizing the Web site content, we have also developed a taxonomy to improve access to the valuable resources therein. Based on a thesaurus prepared with the generous assistance of Access Innovations and taxonomy software donated by DataHarmony, we have developed a hierarchy within the website to significantly improve access and search capabilities.

The Web content management system requires the correct metadata to be added to all Web pages using the thesaurus above. The lack of metadata in the past compromised the effectiveness of searches carried out. We have now added the search engine box to the Home Page with a link to advanced search capabilities. We strongly recommend the use of this tool to facilitate access to the resources you need. However well a Web site is structured, some resources will not easily be found by surfing.

A short introduction to each top-level section has replaced the lists of links previously found on the Web site. This will assist users in checking whether they are in the correct section to find the information they want.

Knowing Where You Are

A 'crumb-trail' has been added to the Web site to clearly show your location within the site, and simplify navigation. This function lists at the top of each Web page where that page is within the hierarchy of the Web site, e.g. Leadership > Resources > Label/Roster Requests - a simple, but useful function when surfing a Web site.

Look for more Web site improvements in 2004

We'll be making additional enhancements to the Web site throughout the year. As they occur we will send you more information. If you have any suggestions for improvements please let us know at kex@sla.org.

John R. Latham
Director, Knowledge Exchange
john@sla.org

Supporting the KM Environment: The Roles, Responsibilities, and Rights of Information Professionals

By Sue Henczel

Sue Henczel is the Training, Cataloguing and Consortia Manager for CAVAL Collaborative Solutions, an academic library cooperative in Melbourne, Australia.

•••• Constructive Thoughts on Knowledge Management

As I have conducted workshops across Australia, New Zealand, Asia, and the United States over the past few years, it has become increasingly evident to me that while some information professionals have successfully embraced change and moved forward, many others are struggling to find their place in the knowledge management (KM) environments that have emerged within their organizations. Many of those who are struggling have years of expertise, while others are relatively new to the profession. Regardless of their tenure, many individuals have seen their roles and responsibilities downgraded because they were not perceived as contributing directly to the KM initiatives. Some of our readings tell us that we have to develop new skill sets to remain relevant, while others tell us that we need a new mindset to move into our 21st century roles. I hope this article, which incorporates my own thoughts and ideas and those of colleagues and workshop participants, will encourage constructive discussion of the roles, responsibilities, and rights of information professionals in this era of knowledge management.

How KM Has Changed Our World

Let us begin by looking at what KM is and how it has changed our roles within our organizations. Knowledge management is a management philosophy comprising elements of a number of disciplines, including human resources management, organizational learning, informa-tion management, and information technology (IT) (Standards Australia, 2003). The amalgamation of these elements into what many consider a "new" discipline has raised numerous issues, including those of ownership, resourcing, competencies, roles, and responsibilities. Many organizations have embraced KM with a clean

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sweep–new management, new funding and resourcing, and new objectives–often ignoring the relationships between what they believe they need and what they already have.

Many organizations that have embraced KM already have well-established information management processes, yet they have often sidelined or overlooked those processes when new KM initiatives have been introduced. This situation has had a significant impact on the success of the initiatives. Where a KM process is established without being underpinned by good information management, the knowledge that is created or reused may be substandard or inaccurate, as may be based on irrelevant, inaccurate, outdated, or unauthoritative information.

Information professionals are trained to manage information and to provide the most relevant and up-to-date information to their client base. They are also trained to ensure that information products and services are aligned with the achievement of organizational objectives. These are critical processes in ensuring that information users have the "best" information available so that the knowledge generated is "good and valid" and meets organizational requirements. This tells us that our skills and knowledge are still relevant and valuable; yet KM initiatives and environments are being established and nurtured without a clearly defined role for information professionals.

There are obviously a number of possible futures for us. In his latest book, *Beyond Degrees*, Guy St. Clair introduces us to Knowledge Services, which he defines as the amalgamation of information management, knowledge management, and organizational learning. St. Clair presents Knowledge Services as a new profession that underpins the 21st century, knowledge-focused, learning organization. I recommend this book, as it presents a clearly articulated view of one possible future.

TFPL, a training and consulting firm in the UK, provide a framework for a different future in their research into the skills required in the knowledge economy. Their Knowledge Skills Map depicts skills sets covering strategic and business skills, management skills, intellectual and learning skills, communication and interpersonal skills, information management skills, and information technology skills. They also provide core competencies for knowledge cultures.

In addition to the KM books that relate to our profession, we must begin to read (or at least be aware of) the KM books that our managers and decision-makers are reading. This is where they get many of the ideas that will shape our futures.

Some Thoughts about KM and the KM Environment

Knowledge management is seen as a means of achieving organizational goals. It consists of the systematic processes that are put into place to identify, create, capture, share, and leverage the knowledge that is needed for an

organization to succeed. Putting it simply, KM aims to (1) determine what knowledge an organization needs to be successful; (2) capture and store explicit knowledge until required for reuse; and (3) manage and exploit the tacit knowledge that resides within people.

KM initiatives use four primary processes to achieve these aims:
1. identification/discovery
2. creation/acquisition
3. capture/storage/codification/retrieval
4. sharing/transfer/flow

The KM environment is holistic, with all processes and programs having an organizational focus rather than a section/department/business unit focus, and incorporating the external environment in which the organization operates. It is also open and visible– knowing what everyone does and why (where they fit in the organization and what they contribute). The KM environment is a sharing culture, value based and people focused, motivated and committed, proactive, resourced and supported, and technology enabled.

So Where Do Information Professionals Fit?

When working in a knowledge environment, the information professional has three primary roles and responsibilities:
1. to provide information products and services that continually and consistently match the requirements of the organization;
2. to educate information users to ensure that they can access and use the information products and services effectively to maximize the quality and consistency of organizational knowledge; and
3. to facilitate the sharing and transfer of knowledge.

Each of the four primary KM processes is underpinned or supported by tasks/activities that require the skill and knowledge of an information professional.

Knowledge identification/discovery	Defines what knowledge the organization needs for business success and identifies what it has and doesn't have (as well as what it has that it doesn't need)	Needs assessment Information audit Knowledge audit
Knowledge creation/acquisition	Determines where valuable knowledge is being created within the organization (and by whom, which process, etc.), and defines what the organization needs to acquire from external sources	Select, source, and acquire external resources Source and evaluate external information Identify and evaluate internal information Facilitate communities of practice Design and develop information products Package information Negotiate contracts and licenses
Knowledge capture/storage/ codification/retrieval	Supports the capture, storage, and codification of valuable knowledge for effective retrieval	Develop thesauri/taxonomies Index and abstract Code Catalogue/classify/metadata Ensure effective and efficient access and delivery Train in access and retrieval Communicate delivery options
Knowledge sharing/transfer/flow	Develops a sharing culture so that knowledge is transferred efficiently to where it is needed	Map information/knowledge Facilitate communities of practice

We can successfully undertake many of these processes or activities using our existing skills and knowledge. Continuing education (CE) courses can help us with those that were not covered by our LIS programs.

We are well trained to manage explicit knowledge that is documented in reports, records, databases, and so forth, but explicit knowledge has no value to an organization until a person uses it. To create new knowledge and to effectively reuse captured and stored knowledge requires an explicit-tacit (or a tacit-tacit) interaction. Consequently, storing explicit knowledge is only a part of the KM process—it must be stored in such a way that it can be accessed and used by the right person, at the right time, in the right context before it has business value. Information professionals can become facilitators of this process by:
• facilitating the access and retrieval process by creating indexes, taxonomies, thesauri, and abstracts; applying metadata and otherwise cataloguing and classifying the documents;
• educating information users in efficient and effective retrieval practices;
• ensuring that any required external information is acquired;
• maintaining a liaison with IT professionals to match access and delivery options with user preferences; and
• maintaining a liaison with human resource/training professionals regarding information and computer literacy skills and training.

KM acknowledges that the knowledge that exists within an organization's employees is its key to success; therefore the first of two major changes in our roles as information professionals is a shift from a technical/process focus to a more people-oriented focus. The emphasis is not only on the processes that enable information to be provided and used effectively, but on the personal attributes necessary to take on the required facilitation and communication roles.

The second major change is a shift from the traditional concept of providing a service to being part of the organization's core business. We continue to become highly skilled at information access and delivery, but we lack the overall knowledge of the organization and its operations to participate actively in planning and decision-making (Abell and Oxbrow, 2001). This is particularly evident where information professionals have taken on a diverse range of new responsibilities without dropping the activities that no longer add business value.

We need to examine our new responsibilities and evaluate where our competencies place us. We then need to determine what actions are necessary to enable us to move forward. It is likely that those actions will include a mixture of skill/knowledge-based and personal development programs, as selecting CE programs that are purely skill, or knowledge focused alone will not enable us to become key players if we do not have the requisite personal attributes of motivation, confidence, and assertiveness.

Competencies comprise skills, knowledge, and personal attributes. These components must be present in the right balance for a person to be competent at a specific task, so it is important to understand what the components of a competency are in order to evaluate whether we have them or need to acquire them. To select CE and personal development programs, we must also identify the components of the competencies that we wish to acquire or improve. We can then rate ourselves in order to prioritize our individual learning requirements.

Breaking down the competencies into their components gives us the lists of skills, knowledge, and personal attributes that comprise the competencies. One of the critical issues here is that often a skill can be learned but cannot be applied effectively without the requisite personal attributes. For example, communication is a skill, and the processes can be learned. To be effective communicators we must have the confidence, motivation, and self-assurance to apply the learning. Consequently, "communication" is listed as a skill, whereas "effective communication" can be listed as a personal attribute. A further example is the skill of negotiation. Once again, we can learn the processes, but without the necessary personal attributes such as effective communication, motivation, open-mindedness, and flexibility we are unlikely to negotiate well.

On page 18 are some examples of the skills, knowledge, and personal attributes that workshop participants have applied to the KM competencies. These are not definitive lists, but examples of the how the lists of skills, knowledge, and personal attributes can be developed from the competencies.

Knowledge Identification/Discovery
Defines what knowledge the organization needs for business success and identifies what it has and doesn't have (as well as what it has that it doesn't need)

Information Professional Contributions	Skills	Knowledge	Personal Attributes
Needs assessment Information audit Knowledge audit	Audit/Survey Analysis Evaluation Planning Decision-making Prioritization Negotiation Project management Communication Team development and management Facilitation	Of the organization -Political -Cultural -Social -Economic/Financial -Technical -Structure External Environment Industry Social networks	Confident Effective communicator Self-starter Collaborative Flexible Open-minded Able to learn Inquisitive

Knowledge Creation/Acquisition
Determines where valuable knowledge is being created within the organization (and by whom, which process, etc.), and define what needs to be acquired from external sources

Information Professional Contributions	Skills	Knowledge	Personal Attributes
Select, source, and acquire external resources Evaluate resources Identify and rate internal information Facilitate communities of practice Design and develop information products Package information Negotiate contracts and licenses Information/knowledge maps	Selection Acquisitions Evaluation (content, vendor, format, delivery, etc.) Communication User profiling Negotiation (with users, vendors, management) Financial management Mapping Training/instruction	Of the organization -Political -Cultural -Social -Economic/Financial -Technical -Structure External Environment Information-seeking behavior User behaviors and preferences Legislation Content Industry Learning styles	Effective communicator Self-starter Collaborative Flexible Open-minded Able to learn Inquisitive Proactive Risk-taker Confident

Knowledge Capture/Storage/Codification/Retrieval
Supports the capture, storage, and codification of valuable knowledge for effective retrieval.

Information Professional Contributions	Skills	Knowledge	Personal Attributes
Develop thesauri/ taxonomies Index and abstract Code Catalogue/classif/metadata Ensure effective and efficient access and delivery Train in access and retrieval Communicate delivery options	Thesauri/taxonomy development Indexing Abstracting Coding Cataloguing and classification Metadata application Training/instruction Communication Negotiation Facilitation Search and retrieval	Information organization User behaviors and preferences Technical infrastructure Learning styles	Effective communication Confident Collaborative Open-minded

Knowledge Sharing/Transfer/Flows
Develops a sharing culture so that knowledge is transferred efficiently to where it is needed

Information Professional Contributions	Skills	Knowledge	Personal Attributes
Map information/knowledge flows Facilitate communities of practice Facilitate information/knowledge sharing	Mapping Analysis Communication Training/instructional Team development and management Facilitation	Of the organization -Political -Cultural -Social -Economic/Financial -Technical -Structure External Environment Industry Social networks User behaviors and preferences	Effective communicator Self-starter Collaborative Flexible Open-minded Inquisitive Proactive Risk-taker Confident

Professional associations and educators must develop comprehensive and cohesive CE programs to enable information professionals to meet the needs of the KM environments in which they work. Information professionals must evaluate their individual levels of competence and develop structured plans for their own professional and personal development.

Information professionals have roles and responsibilities as well as rights in the KM environments in which they work. The following roles, responsibilities, and rights do not comprise a definitive list but are examples suggested by workshop participants:

Roles
• To provide the information management component of KM.
• To provide information products and services that support KM initiatives.
• To support the information management (IM) components of the KM processes.

Responsibilities
• To ensure that KM is supported by good IM.
• To have a clear understanding of our role in the KM processes and the significance of our contribution to the KM achievements.
• To work in collaboration with other KM individuals and teams, not in competition with them.
• To have confidence in our ability and to apply skills and knowledge assertively.

Rights
• To be acknowledged as key players in KM initiatives and significant contributors to KM achievements.
• To have professional LIS and CE programs that meet the evolving needs of information professionals and their organizations.

I hope that this article will serve as a starting point for thought, discussion, and action that will lead to an easier and clearer path for information professionals to follow.

I am happy to receive comments and feedback at sueh@caval.edu.au.

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information trends

The Challenge Ahead — Sustaining Our Relevance

By Stephen Abram

We have seen, in the past few months (I am writing this in November 2003), extreme advances in the area of *interoperability*, especially on the desktop. The lines are really blurring–between content and context, between software and hardware, between wired and wireless, between entertainment and work. Indeed, the new Millennials, that generation the first of whom are just now finishing their bachelor's degrees, are coming into a world that's beautifully designed to match their learning and information-seeking behaviors. It might just leave us behind too . . . groan . . . if we don't think smart and work quickly and nimbly to ensure special librarians' continued relevance.

Here's the Challenge

Is the desktop getting too good? Consider these autumn 2003 news releases:

• Reuters has hooked up its instant messaging (IM) network with quite a few others–Microsoft, AOL, IBM Lotus, and Yahoo.
• Extreme conversational connectivity and secure access aimed at the critical e-commerce, trading, and financial markets is a powerful initiative.
• Suddenly e-mail is looking creaky and old–just an e-version of our grandparents sending letters through the mail and posties walking them door-to-door, placing them in physical boxes.

Combine this with some new developments at Yahoo. Its IM client can now co-browse the Web, allowing IM users to share websites and Web pages easily and seamlessly. I have also enjoyed the emergent IMvironments–IM versions of com-munity spaces. Now–wait for this–the latest Yahoo IM offers PC to Mobile conversations! Lord! My digital phone is now feeling oh-so-last century!

Microsoft Corp. began distributing MS Office 2003, leveraging its native XML underpinnings to include access to several key content sources–Gale, Alacritude, Factiva–directly from within Office applications. You are probably pretty familiar with Microsoft Office Suite (Word, Excel, Outlook, PowerPoint, and Access), but expand that awareness to include the new Office System additions (InfoPath and OneNote), and Microsoft Office FrontPage, Publisher, SharePoint Services, and SharePoint Portal Server 2.0. Spend some time reviewing the Microsoft site and learn more.

These products were designed to improve information intelligence, personalize access to information, reduce the barriers to access, deliver business information as seamlessly as possible, and streamline processes for learning, teaming, and collaborating. You will note that the first three partners for information provision are key to special libraries. Factiva's first solution for Office 2003, Factiva News Search, is designed to allow information workers to conduct research on Factiva's collection of sources directly from a report, spreadsheet, or presentation they're creating. Gale, part of Thomson Corporation, will offer Microsoft users access to a portion of Gale's online information resources. For example, by highlighting a company name in most Microsoft Office 2003 applications, customers can receive Gale-published company profiles within the application and also may purchase individual reports of more than 450,000 international public and private company profiles. Alacritude, republisher of eLibrary and Encyclopedia.com, will offer eLibrary through Microsoft Office 2003. Again, when a word is highlighted within most Office applications, eLibrary search results appear in a research pane within the document. The results include article abstracts from newspapers, newswires, magazines, journals, transcripts, maps, photos, and reference sources.

In November 2003, Google released the Search Deskbar. No, this isn't the familiar Google MSIE Browser Search Toolbar we all know and use. It's a new search application that lets PC users perform Google searches at any time from inside any application. It is browserless, or browser independent. And, it's free. Once downloaded, it appears as a search box in the Windows taskbar at the bottom right of most Windows-based PCs. For now it's only English and Windows (98/ME/2000/XP running IE 5.5 or higher). Key features are basic for now, following the simple Google model. Besides searching using Google, you can preview search results in a small inset window that closes automatically, access Google from any application by typing $Ctrl + Alt + G$, and use other simple keyboard shortcuts for multiple searches for Google News, Google Images, or Froogle–even when your browser isn't running. You can use the Google Deskbar to obtain quick answers from the Web without leaving the task at hand, confirm the latest news stories in Google News, solve math equations with Google's calculator, and look up the meaning of words with Google's define operator. If you don't love Google, feel free to check out HotBot's Quick-Search Deskbar, which also offers instant search to the four major Web search services that HotBot queries (FAST, Google, Inktomi, and Teoma) and a host of other cool features–including access to over 200 deep and invisible Web searches. It's browser-free, too.

Also, talk about your huge online library! OCLC WorldCat and Google

started testing the opening of WorldCat records to Google access. The trial will offer a 2 million-record subset from the more than 53 million records in the WorldCat database. It will likely be in release when this article is published. I hear you'll just input your ZIP Code and be directed to the library closest to you that has the book you need. So far, the plan is to offer a subset of records of the most popular and widely available books by selecting only records held by a minimum of 100 libraries. More than 12,000 libraries are in the pilot! Until this pilot, the only way end-users could search WorldCat was to use FirstSearch, almost always in a library. The world of book collections is opening up, and clearly books are not dead.

Amazon announced its "Search Inside the Book" this past October. The service lasted mere weeks after some authors complained that it threatened sales of their works. As of November 7, 2003, Amazon.com had stopped allowing users of its "Search Inside the Book" feature to print pages of online books they find. The service covered 120,000 scanned books! Amazon said the program was designed to promote, not hamper, book sales by letting Amazon users browse content before buying. Using the tool, people can type in any keyword and receive results for all pages and titles of various books that contain that term. Interestingly, Google is in talks with several publishers to build a service that would allow Web surfers to search the full text of books online, according to a report from *Publishers Weekly's* online site. So far, Google is reported to have the rights to scan as many as 60,000 titles.

At time of this writing, rumors swirl that Google has been talking to Microsoft about partnerships and acquisition in the context of their recently announced potential initial public offering. And new Microsoft content partnerships are being announced weekly.

ARRRGHHHHH!

What Is the 2004 Desktop Going to Look Like?

Well, folks, I think that there are some real threats and opportunities for us here. We survived the data revolution. We helped lead the information revolution. We coped and are coping with the Knowledge Economy. This last shift, though, is the toughest. We are actually starting to see the seamless integration of information and content into the working, learning, playing, and entertainment environments of our users. Instead of just helping people become more knowledgeable with our services, we will be contributing to the world of improved human behavior. We certainly can't "own" that, but we can now seriously contemplate the SLA slogan–*Turning Information Into Action!*

Here's the Strategy

Off the top of my head, I can see a few key strategies you must focus on to emerge from this challenge new and improved!

We must communicate the critical role that information literacy skills play in our organizations. While the role of librarians in training and educating end-users in these key skills is obvious, we are not an easily scaled solution. So many users, so little time, and so few of us! We'll need to investigate e-learning, distance learning for bibliographic skills, information coaching (using IM and virtual reference) and ensuring that our students and professional and work colleagues are ready to adapt to this new age. Run–don't walk–down to your human resources vice president and start building a relationship. You need to be mainstream in HR for organization development issues and training.

We also need to inform our executives about "information risk." Let's acknowledge that this isn't just about copyright–although that is a clear financial and management risk. It's also the risk of making decisions based on bad information–and bad information *does* happen to good people. We have too many stories of

companies being hurt, patients getting ill, and manufacturing systems failing owing to blind faith in electronically delivered information. Run–don't walk–down to your corporate counsel or executive vice president in charge of quality and start building a relationship. You need to be connected to the executives who care about this stuff.

You will have noted in the beginning of this article the obvious threat/opportunity in acquiring content through software licenses. Over the coming years your organization *will* be upgrading its office systems, and likely to ones that offer access to professional content. IT relationships are critical. You definitely don't want to be caught by surprise when this is launched to the desktop! You really want to be invited to be part of the team–but if you're not invited, horn in. And finally, this isn't a pure threat–it's a big opportunity. Just compare IT budgets to library budgets and you'll see the huge opportunity here! Don't walk–don't run–just pick up the phone and invite an IT head to lunch.

As always, we sit in an interesting space. We build our key (and unique) competencies on a deep understanding of content. We need to lift up our eyes and see a new technological, human, and enterprise context. We've always known that it's not about the wiring and the pipelines, it's not about the software, hardware, and applications–and it's definitely not about the desktop. For librarians, it's always been about the people.

Once more, with feeling: Knowledge can *only* exist in people's brains. We help people and organizations of people get smarter.

This column contains the personal perspectives of Stephen Abram and does not necessarily represent the opinions or positions of Micromedia ProQuest or SLA. Products are not endorsed or recommended for your personal situation and are shown here as useful ideas or places to investigate or explore. Stephen would love to hear from you at sabram@micromedia.ca.

Meet the Candidates

Beginning on page 24, this issue features Candidates running for SLA Office to serve on the 2004/05 Board of Directors beginning in June 2004. This is your opportunity to acquaint or reacquaint yourself with each Candidate by reviewing their biographies along with their views on the information profession and leadership. Remember to exercise your right to vote! Ballots for the 2004 Spring Election will be mailed to the membership on Monday, January 26, and are due back by March 8, 2004.

Let your voice be heard!

DAILLE G. PETTIT, CANDIDATE PRESIDENT-ELECT

Current Position: Acquisitions/Collections Librarian, James Madison University, Carrier Library, MS 1704, Harrisonburg, VA 22807; 540-568-2655; pettitdg@jmu.edu.

SLA Member Since: 1991.

Past Employment: Director, Information Services, American Hotel & Lodging Association, Washington, DC (1996-2002); Manager, Information Center, American Hotel & Motel Association (1994-1996); Senior Information Specialist, American Hotel & Motel Association (1990-1994); Librarian (part-time), Helen F. Kellogg Library, Santo Domingo, Dominican Republic (1988-1990); Embassy Community Liaison Officer, American Embassy, Tokyo, Japan (1986-1988); Cataloging Librarian, Sacred Heart University, Tokyo, Japan (1985-1986); Library Clerk, Joint Library of the International Monetary Fund and World Bank Library, (1985).

Education: MLS, University of Maryland, College Park, MD (1984); BA (English), University of Wisconsin, Madison, WI.

SLA Chapter Activities *(Washington, DC Chapter)*: elections committee chair (2002); nominating committee chair (2001); member, strategic planning committee (2000); past-president (1999-2000); president (1998-1999); first vice president (1997-1998); professional development chair (1995-1996); membership chair (1993-1995); member, international projects committee (1998-2001).

SLA Division Activities: Social Sciences Division: government relations chair, (1995-1997). Association Information Services Caucus: founding member. Member, Leadership Management Division and the International Information Exchange Caucus.

Association-wide Activities: Member, committee on committees (2002-present); member, awards and honors committee (2001-2002); member, endowment and grants committee (2001-2002); chapter cabinet chair-elect and chapter cabinet chair, SLA board of directors (2000-2002).

Other Professional Activities *(selected)*: member, American Library Association (1984- present); president, Iota Chapter, Beta Phi Mu, (1997); president, Ladies Guild of Santo Domingo (1989-1990); president, Association of Professional Librarians, Tokyo, Japan (1986-1988); board of directors, Tokyo Community Counseling Service, Tokyo, Japan (1986-1988); co-chair American Orientation Program of the Fulbright Commission of Japan (1986-1988).

Awards & Honors: Co-winner, Washington DC Chapter board of directors award, 2000. Employee of the month, AH&MA (1992). Member, Beta Phi Mu; Phi Beta Kappa; Phi Kappa Phi (scholastic honoraria).

Publications: managed the production of *Hospitality Compensation & Benefits Survey*, 1995, 1997, 2000, 2002 editions and *The Lodging Survey*, 1998 and 2001 editions, and wrote articles for the American Hotel & Lodging Association in-house newsletters and national magazine.

1) One of SLA's Core Values is: "Leadership: Strengthening our roles as information leaders in our organizations and in our communities, including shaping information policy." How would you move forward in accomplishing this?

I would lead by example; just saying you'll do something isn't enough. I think it's very important to volunteer and work with organizations such as SLA, supporting information literacy with time and money. On the other hand, leadership may mean taking an unpopular stand in our organizations or communities, which I believe I have the strength to do when necessary. Having lived in developing countries, I saw firsthand how ignorance creates fear and poverty. My vision is to communicate the importance of an educated and informed workforce and population. One of the reasons I accepted the nomination to run for president-elect of SLA was to have the power of the organization and the membership behind me in trying to shape information policy for a positive good!

2) What has been your must significant contribution to SLA?

I am very proud of my involvement in the creation of the fellows program for librarians from developing countries who were able to attend the Global 2000 conference in Brighton, England. However, I think that my most significant contribution to SLA was my "behind the scenes" role as a member of the 2001-2002 board of directors in rewriting the by-laws. I recognized that changing the by-laws was essential in being able to make some of the other changes that needed to be done at SLA. There was some reluctance to proceed because of opposition to the proposed by-laws. However, I was one of a group that pushed to continue to work with the membership to make the changes the members wanted and to communicate effectively throughout the process. I spoke publicly in several forums to explain the new by-laws and what they meant for SLA's future. Although I was no longer on the board of directors when the by-laws passed in August of 2002, I felt like I'd given birth!

3) What has been your most significant accomplishment working in the information profession?

Ironically my most significant accomplishment to the information profession occurred because I was laid off by the American Hotel & Lodging Association! When it became obvious that our new CEO was determined to "downsize" and was scrutinizing the functions of the information center, I didn't want to happen what had occurred at several other association information centers – that to save money, management had shut the information center and "trashed" the collection. I vowed – even though I was losing my job – that I would work within the organization to keep together the collection (which contained a lot of unique and valuable material) and continue the reference service to the members. The information center was eventually outsourced to a hospitality school, but primarily through my efforts, the collection was moved and kept intact, and a person was hired to provide reference services to the association's members.

PAM ROLLO, CANDIDATE PRESIDENT-ELECT

Past Employment:
Vice President LexisNexis, 2003 to present.
Director, Information Resources, Vice President, Library for the Americas, Assistant Vice President, Reference Manager/Records, Reference Manager, Reference Librarian with Credit Suisse First Boston, New York, New York 1986-2002
Director of Research with Fleming Associates Miami Fl, 1984-1985
Branch Director, Assistant Branch Director, Reference Librarian with Harris County Public Library, Houston, Texas, 1981-1984
Indexer, Humanities Index, HW Wilson, Bronx, New York 1978-1980

Education:
MS Library Service, Columbia University, New York, New York 1978
BA History, Le Moyne College, Syracuse, New York 1976

SLA Chapter Activities:
New York Chapter: Member 1986-Present, New York Chapter: Business & Finance Subgroup Chair 1994-1995

SLA Division Activities:
Business & Finance Division: Centers of Excellence Steering Committee 2002-03
Chair Nomination Committee 2001; Global 2000 B&F Program Planner 2000
Business & Finance Chair 1999; Business & Finance Chair- Elect and Annual Meeting Program Planner 1998, Roundtable Coordinator 1996

SLA Board of Directors:
Division Cabinet Chair 2003-04
Division Cabinet Chair-Elect 2002-03

Other Professional Activities:
Member Conference Board, Information Services Advisory Council 2000-2002

Awards and Honors:
Primark Award, Business and Finance 2000

Publications/Presentations:
SLA Conference Presenter 1992-2003
European Business Information Conference (EBIC) 2000
North American Business Information Conference (NABIC) 1999: "Vendor Relationship Roundtable"
European Business Conference EBIC 1998; " Valuing Information"
North American Business Conference (NABIC) 1997 "Benefit Analysis of Online Services Delivered to Desktop"
North American Business Conference (NABIC) 1996: "Distributed Desktop Resources Workshop"

SLA Conference Presenter, New York Chapter Business & Finance subgroup Presenter and Presenter at National Online (New York City)

1) One of SLA's Core Values is: "Leadership: Strengthening our roles as information leaders in our organizations and in our communities, including shaping information policy." How would you move forward in accomplishing this?
While we know our value as policy shapers to organizations, both intuitively and anecdotally, senior decisions makers and the world of public opinion must yet be convinced. We have spoken about this challenge conceptually, but it is time, and the Association is ready to tackle this specifically. As an advocate, the Association must look to provide a quantitative value proposition and visibility for its members. I would encourage the Association to host a symposium in partnership with other sponsoring organizations interested in information management, inviting CEOs, CKOs, CIOs, Deans and Scholars (and of course information professionals) to comment on what they understand information policy to be today and what skills and values demonstrate leadership in that field. The presentations to the Symposium could be sold to fund subsequent research done within our membership, demonstrating that these values exist both quantitatively and qualitatively. The results of this research would be used to market our members' capabilities both to the general public and to our employers providing the appropriate visibility through articles, press releases and other medium.

2) What has been your must significant contribution to SLA?
I believe my time, as Chairperson for the Business and Finance Division was the most significant. Division leadership wanted to complete just one initiative in a single year, frustrated with the stalling of programs year to year. I implemented a collaborative work style, breaking the process into tasks, and asking those members with the most relevant experience to help; Board members were excellent doers and managers. The Division completed the following initiatives that year: a) a redesign of the Division's web site including an online mentoring program which matched mentors and those seeking mentoring, b) the creation of a mentoring video which featured members speaking to how mentoring was a benefit of SLA and B&F membership (this video was mailed to every Chapter in 1999), c) a fund-raising process plan d) great programming for the SLA conference. We accomplished this with the work and enthusiasm of busy people who hit the mark at every step.

3) What has been your most significant accomplishment working in the information profession?
I have worked with too many great colleagues and assembled too many wonderful teams to think that I have accomplished anything alone. My most significant accomplishment would be the occasions when I could lead project teams composed of all types of professionals working with information dedicated to choosing content, advising on platforms and creating tools. These products and programs enabled my fellow employees to create knowledge, serve clients and move the organization forward competitively. The personal professional accomplishments are still a work in progress as I continue to strive to embrace what is new and experiment with opportunities within my career. I still look forward to taking those risks, which either fail flagrantly or succeed wonderfully.

KATHERINE BERTOLUCCI, CANDIDATE DIVISION CABINET CHAIR-ELECT

Past Employment: Taxonomy and Information Management Consultant, Isis Information Services, 1978 - current.

Education: MA in Library Science, University of Chicago, 1977; BA in English Literature and Communication, Southern Oregon College, 1973.

SLA Chapter Activities: Phoenix Networking Chair, Arizona Chapter, 2002 - current.

SLA Division Activities: Library Management Division: Awards Committee, 2003-04; Nominating Chair, 2002-03, Sponsorship Chair, 2001-02; Chair, 2000-01; Strategic Planning Chair; 1999-2000, Consulting Section Chair, 1998-99.

Association-Level Activities: Information Futurists Caucus Convener, 2001 - current.

Awards, Honors and Publications: "Happiness is Taxonomy: Four Structures for Snoopy," SLA Information Outlook, March, 2003; "Taxonomy for the Future: Organizing Futures Information into a New Hierarchical Structure," World Future Society, Futures Research Quarterly (in pre-publication).

1) One of SLA's Core Values is: "Leadership: Strengthening our roles as information leaders in our organizations and in our communities, including shaping information policy."
How would you move forward in accomplishing this?
SLA does not take its place at the forefront of the information policy debate. We primarily defer to public and academic libraries in this arena. However, SLA represents an increasingly mainstream style of information management. So our more innovative members should be active in the theoretical aspects of information policy development. Chapter, Division and Association level programs would help to encourage this.

2) What has been your must significant contribution to SLA?
Because of my concern about SLA's contribution to the information policy debate, I produced two conference programs on digital preservation. The records of corporate memory are a part of history and our members need to be concerned about this. The first program, with Jeff Rothenberg of Rand Corporation, provided an introduction. The second with Ken Thibodeau of the National Archives, gave an update on state-of-the-art techniques. These programs both had an impact on our member's involvement in digital preservation within their own information centers.

3) What has been your most significant accomplishment working in the information profession?
I realized early that traditional library resources are not the optimal organizing strategy for subject-based collections. So I developed a technique for designing proprietary hierarchical classification systems, customized for my clients. With the advent of Internet browsing categories, others have experienced the value of this method for organizing information. It is now called taxonomy. In my 25 years working with taxonomy, I have developed a unique approach to the presentation of information discovery tools. My methods make it easier to find and to understand information. This approach is synthesized in my theories of persuasive, perspective and personal taxonomy. Persuasive taxonomy recognizes that presentation imparts meaning to information. The design of a classification system can itself be used to promote enterprise goals. Perspective taxonomy recognizes that information usage influences its own presentation and organizational structure. Personal taxonomy takes this to an individual level. I am currently using almost all my time to present these theories within the broader information community.

TRUDY KATZ, CANDIDATE DIVISION CABINET CHAIR-ELECT

Vice President, Marketing Intelligence Center
MasterCard International

Member since 1987

1. Past Employment:
Information Professional Consultant, LexisNexis (1995-1997)
Director of Information Resources, Kroll Associates (1992-1995)
Deloitte & Touche (1986-1992)
Social Sciences Index, H.W. Wilson Co. (1981-1986)
Technical Librarian, NCR Corporation (1981-1986)

2. Education
ML, University of South Carolina, (1976)
B.S., Temple University (1974);

3. SLA Chapter Activities
Hudson Valley Chapter, Director (2001/2003, 2003/2005)
New York Chapter, Co-Chair Career Day (1995/96),
Professional Development Chair (1994/95), Membership Chair
(1992/93, 1993/94)

4. SLA Division Activities
ITE Division, Chair (2000/2001), Conference Planner,
(1998/1999), Virtual Section Chair (1996/97), Networking Unit
Chair (1995/1996)
Business and Finance Division, Nominating Committee
(1994/1995)
Library Management Division, Marketing Unit, Chair Swap &
Shop (1995/1996)
and numerous Committees from 1990 to present.

5. Association-level Activities
Division Cabinet Chair-Elect Candidate (2003/2004)

6. Other Professional Activities
Adjunct Professor, Long Island University, Palmer School (2000
to present)

7. Awards and Honors and Publications
Fellow of the Special Libraries Association (2003)
"A Successful Intranet Move to the Extranet", Intranet
Professional, (2002)
Profiled in Information Outlook, (April 2001).
"Marketing Your Library", MLS (1998),
"The Internet in a One Person Library", chapter in The Internet
Librarian (1994),
and many presentations for Chapter and Division activities.

1) One of SLA's Core Values is: "Leadership: Strengthening our roles
as information leaders in our organizations and in our communities,
including shaping information policy." How would you move for-
ward in accomplishing this?
To be recognized as information leaders in today's world is a
most difficult task. Our competition is fierce and it's every-
where. To accomplish this task we are clarifying our mission,
vision, goals and objectives at the Association level. Enabling
our members to employ these tactics within their organizations
is the next step.

At this important juncture in our profession, we should look at
the competition and turn the threats into opportunities. We
would benefit from partnerships with other information associ-
ations. Through the collective thought leadership and the
diversity of the memberships we can accomplish our goals.

2) What has been your must significant contribution to SLA?
I have been an active member of SLA for a long time. At the
beginning of my career, I absorbed knowledge and asked ques-
tions of more experienced professionals (they probably didn't
know they were my mentors). I now enjoy mentoring our
newer members in the association. Both Divisions and
Chapters recycle active members in leadership positions. If we
don't carefully mentor our new leaders, we ask too much too
soon and turn them off from future leadership positions. I am
proud to say I have been instrumental in keeping the "pipeline"
full at both the Chapter and Division level. Recruiting new
members and encouraging active membership is vital to the
health and growth of our Association.

3) What has been your most significant accomplishment working in
the information profession?
My most significant accomplishment is my contribution to the
future of our profession. I have been an adjunct professor at
Long Island University, Palmer School for several years. The
first day of each semester (when teaching the introduction
class), I ask each student to share the experiences that led to
their decision to pursue this career. Everyone has a story and
the stories are remarkable. For example, students have law
backgrounds, degrees in linguistics and computer science, and
they are teachers. I also get a chance to share my story, using
personal experiences to emphasize issues and topics. During
the semester we debate topics that transcend all different types
of libraries. I often hear from students later in their careers
and it's a wonderful feeling, knowing I had a small part in
shaping a career.

SUSAN KLOPPER, CANDIDATE DIRECTOR

Employment:
· Manager of Research Services, Goizueta Business Library, Emory University, Dec. 2002-
· Director, Business Research Center, Arthur Andersen, 1985-2002
· Corporate Librarian, Turner Broadcasting System, 1984-1985

Education:
· Southern Connecticut State University, MLS, 1984
· University of North Carolina at Chapel Hill, BA, 1977

SLA Chapter Activities:
· Member, Georgia Chapter, 1984-
· President, Georgia Chapter, 1985-1986

SLA Division Activities:
· Member, B&F, LMD, ITE, Legal Division, Baseball Caucus
· Chair, B&F Division
· Conference Program Planner, B&F, LMD

Association-Level Activities:
· SLA Board of Directors, Division Chair, 2000-2002
· SLA Fellow
· Chair, Annual Conference Program Planning Committee
· Member, Conference Planning Task Force
· Member, Professional Development Committee, 2002-2005
· Participating faculty at SLA's MLS Renewal colloquium, 2001

Other Professional Activities:
· Member, ALLA, ALLA
· Member, Conference Board, Information Services Advisory Council
· Frequently speaks and presents workshops at international conferences, including Web Search University, Online World, Internet Librarian, National Online Meeting, EBIC, NYBIC, AALL on such topics as the business research process, products, and services, management, leadership, future of the information profession, enterprise information portals, creating value for customers, tax and accounting research
· Spoke at Yale University's Standing Committee on Professional Awareness about the vantage point and challenges of corporate librarianship
· Participates on vendor advisory councils

Awards, Honors, and Publications:
· LMD Division, Management Leadership Award, 1998
· B&F Division, Disclosure Outstanding Achievement in Business Librarianship Award, 1998
· SLA, International Special Librarians Day Award, 1998
· LexisNexis Leadership Symposium, 2002
· Profiled in Super Searchers Do Business: The Online Secrets of Top Business Researchers, 1999 and Straight from the Stacks: A Firsthand Guide to Careers in Library and Information Science, 2003
· Edited and contributed to Online Accounting and Finance Research, South-Western Publishing/Thomson Learning Company, Dec. 2004
· Regularly contributes articles on business research, information management, leadership and tax and accounting topics to information professional publications, including Online, Searcher, Business Information Alert, eContent, Database, Legal Division Quarterly
· Published articles include:
· "Selling Library Services: Selling Your Expertise," Business Information Alert, June 2002
· "eStat Database: efficient, effective, effordable, essential", Online, March/April 2002

· "Negotiating Realities: Managing Customer Expectations (or How to Keep Them Coming Back for More)," Business Information Alert, March 2001
· "Taxing Research," EContent, June/July 2000
· "Unearthing Market Research: Get Ready for a Bumpy Ride," Searcher, March 2000
· "Web?Based Searching: Finding a New Search Rhythm," Online, September/October 1999
· "Sailing on the AccountanSea: Accounting Research Sources," Database, June/July 1999

1) One of SLA's Core Values is: "Leadership: Strengthening our roles as information leaders in our organizations and in our communities, including shaping information policy." How would you move forward in accomplishing this?
Accomplishing SLA's Core Value, "Leadership: Strengthening our roles as information leaders in our organizations and in our communities, including shaping information policy."
Our success as information leaders is dependent not just on the messages we carry but on the methods with which they are delivered. We must hone our skills to understand what is going on within an organization and craft the message so that it will resonate with the organization's goals and priorities. We must be adept at evaluating the organization's culture, its internal language, political structures, and its information policy history. What has worked and what has faced resistance, and why? We must be comfortable with reinventing ourselves and remember that who we are is not as much defined by what we do as by the ways in which we demonstrate and quantify positive contributions to the organization's success. Be patient, persistent, and build on small victories. Listen carefully and watch for signals. Earn a reputation as a leader, driver, innovator, and creative thinker.

2) What has been your must significant contribution to SLA?
My passion for my profession is my most significant contribution to SLA. It drives my desire to mentor colleagues and future information professionals, to be an educated consumer in order to stay a step ahead and learn to think like my users, and to engage vendors in ongoing dialog so that I might better understand their positions as well as to proactively influence what they bring to market. My passion gave me the courage to write articles and speak at conferences, to attend my first annual conference, to walk into a division open house when I did not know a soul, and to become a joiner when I thought I never would. It is the fire behind the messages I carry with me as I do battle with the forces that need further convincing, or an entirely new perspective. My passion drives my commitment to the profession and to SLA.

3) What has been your most significant accomplishment working in the information profession?
I succeeded as Director of Andersen's BRC. It was an exhilarating, challenging, and frustrating experience. It provided me with a canvas on which to read the organization's cultural and political moods, understand its shifting business models and objectives, develop services which anticipated the organization's information needs, and contribute value to client satisfaction and a successful bottom line. I had the opportunity to stretch my wings and mentor a team who taught me important lessons about being a good manager and leader. I persevered during good and bad times, shifts in management personnel and priorities, and withstood organizational challenges to why our services mattered. I learned to be tenacious, brave, a risk taker, public speaker, and advocate for everything that counted. This experience honed my instincts to survive and demonstrated my value. It is my single most credible accomplishment as an information professional.

DEE MAGNONI, CANDIDATE DIRECTOR

Dee Magnoni is the Library Director at Franklin W. Olin College of Engineering.

SLA member since January 1992

Past Employment: President, Magnoni Group (2001-2002); Agency Librarian, Wieden + Kennedy (2000-2001); Assistant Dewey Librarian, Massachusetts Institute of Technology (1998-1999); Corporate Librarian, Helix Technology Corporation (1996-1998); Reference Librarian, part time, Roger Williams University and Rhode Island College (1994-1996); Multimedia Development Librarian, grant project, Rensselaer Polytechnic Institute (1993); Bibliographic Instruction/ Behavioral Science Librarian, Utica College (1992-1993).

Education: M.L.S., State University of New York, Albany, NY (1992); BA with Honors, Government/English, Lehigh University, Bethlehem, PA (1986).

SLA Chapter activities: Boston, member and 1998 Fall kick-off meeting planner (1997-present); Rhode Island, President (1995-1996); Oregon, member (1999-2003); New York, member (1992-1993).

SLA Division activities: Information Technology Division, Chair (2001-2002), Chair Elect (2000-2001), Treasurer (1998-2000), Networking Section Chair (1997-1998); Science-Technology Division, Professional Development Chair (1998-1999); member: Engineering, Library Management, Social Science, Business & Finance.

Association-level activities: Finance Committee member (2003 - present); Competencies Revision Task Force (2001-present); Director, Board of Directors (2001 - 2003); Information Futurists Caucus, Convener (1997-1999); Networking Committee member (2001-2004); Nominating Committee member (1999-2000); Professional Development Committee member (1998-2001);

Other Professional Activities: American Society for Engineering Education (Fall 2002- present); World Future Society (Summer 2003- present); American Library Association (1992-present);

Publications: "A Call to Mentoring," Business Information Alert, 05/2002;"Green Business: The Evolution of an Industry," Business Information Alert, 04/2002; "Is Your Radar On?: Finding Strategies for the New Millennium," Business Information Alert, 11-12/1999; Reviews for Business Information Alert; workshop and seminar materials on industry and market research as well as Internet search techniques; various SLA contributions.

1) One of SLA's Core Values is: "Leadership: Strengthening our roles as information leaders in our organizations and in our communities, including shaping information policy." How would you move forward in accomplishing this?

A core component of strengthening leadership roles is modeling those roles and communicating their value. That communication should happen on several levels: building awareness of roles our members currently hold, fostering mentoring relationships, and disseminating leadership opportunities, best practices, lessons learned, etcetera. This past year I became Vice President of my church council. The role has provided me with tremendous growth opportunities. Many of the issues a congregation struggles with have parallels to our association and to my job. The synchronicity of diverse leadership roles is enriching to each of my positions. I am also actively involved with my local Exchange Club. As an information professional I have taken on the role of providing communication channels for the thirty plus committees of the organization. This is an example of using my professional skills to benefit a community organization, and in return being enriched by the wisdom that exists within the group. These types of stories should be shared within SLA. The Board of Directors can become leadership models by sharing their own stories and inviting others to join the conversation.

2) What has been your must significant contribution to SLA?

The SLA contribution I am most passionate about is my involvement with the Diversity & Mentoring program that I started working on within the Information Technology Division (DITE). When DITE discussed what sort of mentoring program to develop, we decided that a diversity focus was important for our division and the profession. We held a breakfast that included a panel of mentors and a number of scholarships. In partnership with the Diversity Leadership Development Committee, we launched a discussion list to provide a forum for diversity and mentoring topics. That partnership turned into a joint breakfast this past year, and is now a multi-unit effort with growing numbers of organizers and scholarships. Our group is passionate and ambitious, with plans to reach outside SLA, through library schools and businesses, and down to high schools. We hope to do nothing less than change the face of our profession.

3) What has been your most significant accomplishment working in the information profession?

In the summer of 2002 I was hired to start an academic library from scratch. This would be no ordinary library, but one that supported an engineering institution newly founded to fundamentally change engineering education. The library needed to not only deliver outstanding digital & physical resources & services, but also foster creativity and innovation. Olin's wireless campus and student laptop program offered a unique opportunity. Rather than filling my space with computers, I minimized public workstations and maximized space for contemplation, play, and group interaction. There is space to study, build models, program Legos, and combat temporal exhaustion - 24/7. Students, faculty and staff love this space. Welcome to the academic library of the future!

LYLE W. MINTER, CANDIDATE DIRECTOR

Head, Newspaper and Current Periodical Room, Serial and Government Publications Division, Library of Congress, Washington, DC.

Past Employment: Head, Government Publications and Periodicals Section, Serial and Government Publications Division, Library of Congress, Washington, DC (1991-1997); Chief, General Reference Branch, The Pentagon Library, Washington, DC (1988-1991); Senior Librarian Development Training, Army Libraries Management Office, Washington, DC (1990); Senior Research Librarian, The Pentagon Library, (1985-1988); Reference Librarian, The Pentagon Library, (1981-1985); Administrative Librarian, Military District of Washington, Fort Myer, VA (1980-1981); Post Librarian, Vint Hill Farms Station, Warrenton, VA (1976-1980).

SLA Member Since 1988.

Education: B.A., (History), University of Virginia, 1975; M.L.S. (Library Science), University of Maryland, 1976.

SLA Chapter Activities: Washington, DC Chapter: Co-Chair, Awards Committee (2002-2003); Chair, Nominating Committee (1999-2000); Chapter President-Elect, President, Immediate Past President (1992-1995); Director (1991-1992); Second Vice President (1989-1991); Auditor (1990-1991); Chair, Nominating Committee (1989-1990). Virginia Chapter: Member (1994-).

SLA Division Activities: Social Science: Chair-Elect, Chair, Past Chair (2000-2003). Military Librarians: Nominating Committee (1990-1991); Co-Chair, Government Relations Committee (1988-1991). Library Management: Member (1991-).

SLA Association-level Activities: Member, Bylaws Committee (2002-2005); Member, Nominating Committee (2001-2002); Member, Finance Committee (1997-2000); Chair, Tellers Committee (1994-1995); Member, Tellers Committee (1992-1994).

Other Professional Activities: Library of Congress Professional Association (1991-); Chair and Program Chair, Washington DC Military Librarians Group (1985-1987); North American Serials Interest Group (1991-1993); District of Columbia Library Association (1981-1991). Faculty member: United States Government Printing Office Annual Interagency Depository Library Seminar (1992-2003) and the Library of Congress Federal Library Technicians Institute (1997-2003).

Awards, Honors, and Publications: Library of Congress Outstanding Performance Award (1994); Library of Congress Special Service Achievement Awards (2001, 1999, 1998); Washington, DC Chapter Board of Directors Award (1991 and 1992); Department of the Army Sustained Superior Service Award (1980); Beta Phi Mu (1976); Phi Beta Kappa (1975), Phi Alpha Theta History Honors (1973). Publications include: numerous articles in the Social Science Division Bulletin, The Military Librarian (Bulletin of the Military Librarians Division), and Chapter Notes (Washington, DC Chapter Bulletin); "Informing America: Ensuring Public Access to Government Information," Library of Congress Information Bulletin (forthcoming).

1) One of SLA's Core Values is: "Leadership: Strengthening our roles as information leaders in our organizations and in our communities, including shaping information policy." How would you move forward in accomplishing this?

A leader can command the respect of others by demonstrating mastery of a body of knowledge and skills. A leader must then be willing to teach and motivate others by sharing information in meaningful ways. Finally, a leader must take risks to expand beyond the known comfort zone of the group.

SLA can command the respect of others by showing value that information professionals add to the corporate body for which they work. We made an excellent start toward expanding the respect enjoyed by our profession when we produced the competencies document which has been widely acclaimed in academic, business, and government circles. Using SLA members' brainpower and creativity we can expand beyond this initial success by developing credible, experience-based benchmarks, surveys, and best practices which members can use in the workplace to demonstrate their value. As a Board member I will ensure that we fully exploit opportunities to build such a knowledge base.

Communicating our value as information professionals is another way we can lead. We must continue to focus on developing and strengthening our student groups. We can use Information Outlook, the SLA web page, and focused discussion lists to communicate with each other. As a Board member I will be an active participant in this communication process. We must also continue to develop our branding and marketing plan to make sure we communicate our value to others outside the information profession, and we must ensure that we have a vigorous government relations effort at all levels of the Association.

We can take risks to help focus and grow SLA by investing time and money to meet our research needs and to fund our public relations outreach efforts. We can also partner with other associations in fields such as government relations, while at the same time retaining our independence in other areas where we can do things better than our peer associations.

2) What has been your most significant contribution to SLA? My most significant contribution to SLA as a member has been as a person who's willing to work to get the job done. As you can see from my biography, I have worked to recruit talented leaders for the Association by serving on its Nominating Committee, to make sure there is a sound financial foundation for the future of our organization through my work on the Finance Committee, and to make sure our governance is streamlined but accountable as a current member of the Bylaws Committee.

3) What has been your most significant accomplishment working in the information profession?
My most significant accomplishment in the information profession has been working with and training junior information professionals as they begin their careers or transition into a new position. I like mentoring and teaching, and I try to model SLA's professional competencies when working with these new recruits.

DAN TREFETHEN, CANDIDATE DIRECTOR

My career has centered on Solo library practice for businesses in the Seattle area.

Employment history:
1997 - Present: Boeing Air Traffic Management, Seattle, WA
I was hired to establish a research collection of air traffic management (ATM) material and provide sophisticated information delivery services for the ATM organization. My Solo services include a full online catalog to both physical and electronic resources, and a weekly newsletter of the global events in air traffic management, distributed to Boeing employees worldwide. I created my group's internal web site, and currently maintain the contents of two sites (internal and external). I also wrote and produced a major promotional video in cooperation with Boeing Video Services.

1982-1997: TRA Architecture Engineering Planning Interiors Ltd., Seattle, WA
For this major architectural and engineering company I operated a multidisciplinary Solo library, serving architects, structural engineers, graphic designers and others. I managed one of the largest and oldest A/E archives in private ownership in the Pacific Northwest.

I have also worked as a librarian for a small economics firm, and the University of Washington Health Sciences Library.

Education: Masters in Librarianship, University of Washington, Seattle, WA, 1978; Bachelor's degree in English, University of Washington, 1977.

SLA Chapter Activities: Pacific Northwest Chapter: President, 1985-1986. Secretary-Treasurer, 1983-1984. Discussion List Owner, 2000-2003. Seattle SLA Conference Local Arrangements Chair, 1996-1997.

SLA Division Activities: Solo Librarians Division: Chair, 1993-1994. Museums, Arts & Humanities Division: Secretary-Treasurer, 1987-1989. Member of Engineering, Transportation, Information Technology Divisions; Information Futurists Caucus.

Association-Level Activities: Nashville Conference Committee, 2002-2004. Task Force on Simplification, 2000-2001. SLA Nominating Committee, 2000-2001. Consultation Services Committee, 1987-1992.

Awards: Fellow of the Special Libraries Association, 2000.

Selected Publications:
"The Savvy Conference-Goer Does SLA", Information Outlook, v.7, no.5, May 2003. This article on how to make the most of the SLA conference experience was originally published in 1990 in the Pacific Northwest Chapter's newsletter, and has undergone annual revisions.

"The Bylaws Changes: Nefarious Plot, or Unlocking the Handcuffs?", Interface, v. 36, no.3, Spring 2002. An attempt to make sense of the proposed SLA bylaws changes (which were subsequently approved by the membership).
"Musings on Mission Creep", Interface, v. 36, no.1, October 2001. How to manage your career to deal with expansion of your job requirements.

"Designing the One-Person Library" and "SLA's One-Person Library Roundtable: A Report", published in The Best of OPL: Five Years of The One-Person Library, Andrew Berner and Guy St. Clair, Washington, DC: Special Libraries Association, 1990.

"What Works" advice column, SLA Chapter Cabinet Occasional Letter, 1986-1987.

Article about Dan Trefethen: "Profile: Dan Trefethen", The One-Person Library, v. 9, no.2, June 1992, pp. 1-3.

1) One of SLA's Core Values is: "Leadership: Strengthening our roles as information leaders in our organizations and in our communities, including shaping information policy." How would you move forward in accomplishing this?
Our members face daily challenges on issues like digital copyright and licensing, access to government information, and proving their value to management. To win these battles and to be leaders in their organizations and communities, they need a bold Association behind them. I will focus on providing our members the tools and information they need to face these and other 'hot-button' issues. 12,000 information professionals will not agree on policy on each issue, but they can work with the best advice and counsel that the Association can give.

Leaders are only as effective as their understanding of constituents' concerns. I support greater feedback to the Board, SLA staff, and to chapter and division leadership through the use of methods such as the SurveyMonkey polling device, personal networking, and aggressive monitoring and summarizing of SLA discussion lists and newsletters. The members are speaking - we can be better leaders by listening.

2) What has been your must significant contribution to SLA?
As my selected list of publications shows, I have devoted my efforts to help SLA members leverage their ability to use Association knowledge and tools to affect their professional lives. I take to heart the Solo Librarians Division motto, "working together for those working alone". I am proud of serving as the third chair of the Division at a pivotal time of growth, when the Division was transitioning from a newly-minted entity to become one of the largest and most dynamic units in the Association. To create new bonds among members, we performed an extensive survey and published a membership directory with a never-before-seen subject index that focused on our members' specialties. My work in connecting people to the power of SLA includes the authorship of the "Savvy Conference-Goer Does SLA" series of articles, updated for 13 years now, for the benefit of new (and returning!) conference attendees.

3) What has been your most significant accomplishment working in the information profession?
I am proudest of my years of advocating Solo library practice as a powerful way to integrate our services into the businesses of our constituents, working closely with them as teammates. I have worked to expand awareness of librarians' capabilities -- both on the part of our customers and that of librarians, too, who sometimes are too self-limiting. To promote jobs for librarians, I served on the SLA Consultation Services Committee, and as President of the Pacific Northwest Chapter, attended meetings of the local Chamber of Commerce to promote the value of librarians as teammates in the workplace.

PATRICIA CIA, CANDIDATE CHAPTER CABINET CHAIR-ELECT

Past Employment: Corporate Librarian/Webmaster, Teck Cominco Limited (2001-current); Corporate Librarian, Teck Corporation (1996-2001); Librarian, British Columbia Securities Commission (1995-1996); Corporate Librarian, Dynapro Systems (1993-1995).

Education: MLS, University of British Columbia (1993); BA, University of Victoria (1980)

SLA Chapter Activities: Western Canada Chapter: President, elect-acting-past (2000-2003), Acting Treasurer (Nov 2001-Jun 2002); Communications Director (1999-2000); Communication Chair [webmaster, bulletin editor, list owner] (1997-1999); Acting Secretary/Treasurer (Mar-Jun 1997). Committees: Future & Strategic Planning (2000-2001), Strategic Planning (1999-2000), Membership Survey (1998), Policies (2001) Bylaws, Convergence 2000: WCC Pan-Chapter Meeting, Past-President's Outlook Forum (2003)

SLA Association Activities: SLA Code of Accountability task force (2003); SLA Webmasters workshop (1998 & 2000) http://www.sla.org/chapter/cwcn/wwest/v3n4/pcweb.htm; WCC Webmaster during Virtual Chapter initiative (1997-1998)

1) One of SLA's Core Values is: "Leadership: Strengthening our roles as information leaders in our organizations and in our communities, including shaping information policy." How would you move forward in accomplishing this?
SLA produces excellent tools such as the annual salary survey and competencies documents. I would use them to create sound bites and other supporting materials as promotional and marketing tools, distributing these materials to the membership for use within their organizations and broader communities.

I would investigate ways to profile our profession or selected members in international business and academic publications in order to demonstrate our values and competencies in practical and concrete terms. In turn, I would communicate these articles to the membership as examples they may share with their organizations, clients or institutions.

Networking and professional development are also SLA strengths in developing leaders. I would encourage the continued delivery of relevant, leading edge and affordable professional development opportunities to our members, and share examples of programs that appeal to both the newer graduates as well as information professionals practicing five or more years

2) What has been your must significant contribution to SLA?
I believe my most significant contribution was in exploring and implementing ways of opening communication among members, the association, and chapter leaders through newer technologies. (e.g. 2000 Candidate chats, current awareness via discussion list, broadening scope of bulletin)
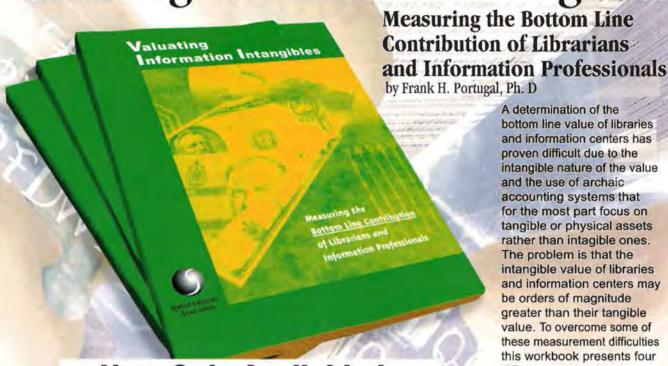
In 1997, the Western Canada Chapter volunteered to be SLA's "Virtual Chapter." I extended our existing web and discussion list into valuable communication tools. We continue to use them to provide board continuity, to inform our members of upcoming events and to update members on the chapter board's work. We also use these tools as a platform for members to share their experiences and best practices.

Wired West: Web Journal of the SLA Western Canada Chapter, was the first bulletin to be produced solely electronically. The web format allowed me to solicit more in depth articles and helped reduce the perception of isolation among members in our very geographically diverse chapter.

3) What has been your most significant accomplishment working in the information profession?
I believe my most significant accomplishment involves demonstrating, through practical use, how technology facilitates communication and access to information. At a time when only the library and a select few other employees had access to the Internet, I developed categorized web resources relevant to my clients. These "Links to the Internet" were shared with other employees via the local network as they gained access to the Internet, and later evolved into the company's intranet where I also prominently displayed other library services. These projects demonstrated the flexibility of our professional skills and helped change the traditional perceptions, showing that information professionals can use our organizational skills and aptitude for sharing in many aspects within the organization.

copyright corner

Database Legislation, Part II

By Laura Gasaway

Last month's Copyright Corner discussed the background of the movement in the United States to protect databases outside of copyright law. On the basis of several years of discussion in both the European Union and the United States, a database bill has again been introduced into Congress. The Database and Collections of Information Appropriate Act of 2003 was introduced on October 8, 2003, as H.R. 3261, and an amended version was favorably voted out of the intellectual property subcommittee.

The bill creates specific liability for the misappropriation of databases; collective works such as periodicals, anthologies, and encyclopedias; and compilations of preexisting materials. It defines a database as "a collection of a large number of discrete items of information produced for the purpose of bringing such discrete items of information together in one place or through one source so that persons may access them." The bill specifically excludes works of authorship, except for collective works, databases related to the routing of online digital communications or multichannel audio or video programs, and domain name registration contact data. It does not restrict anyone from independently developing or gathering information obtained by means other than extracting it from a database and making it available in commerce.

To qualify for protection, the database must have been "created through a substantial expenditure of financial resources or time." This appears to reinstate the "sweat of the brow" doctrine struck down in *Feist v. Rural Telephone.*[1]

The bill creates liability for anyone who makes available in commerce to others a quantitatively substantial part of the information in a database owned by someone else. Before liability attaches, however, the person must know that the activity is unauthorized by the owner of the database. Two other requirements must be met before liability attaches: (1) the information must have been made available at such a time that it causes harm to the database or to someone who is offering access to multiple databases, and (2) provision of database information must "so reduce the incentive to produce the product or service that its existence or quality would be substantially threatened." To determine whether an unauthorized making available in commerce occurs in a time-sensitive manner, a court will "consider the temporal value of the information in the database, within the context of the industry sector involved."

The higher education community, which earlier opposed H.R. 3261, has withdrawn its objection to this new bill because of the exemption for nonprofit educational, scientific, and research institutions. These groups are allowed to make database information available if a court "determines that making available in commerce of the information in the database is reasonable under the circumstances, taking into consideration the customary practices associated with such uses of the database by nonprofit educational, scientific, or research institutions and other factors the court determines relevant." More important, accredited nonprofit postsecondary educational institutions, nonprofit research laboratories, and their employees acting with the scope of their employment are exempted from liability.

Two other important exemptions include hyperlinking to a database by websites and making information available in commerce for the primary purpose of news and sports reporting, unless such information is time sensitive and has been gathered by a news-reporting entity or if making the information available is part of a consistent pattern engaged in for purposes of direct competition with the database proprietor.

The bill contains a statement that it will not affect intellectual property rights or contracts. It provides a civil cause of action with injunctions, actual damages, attributable profits, impoundment and destruction of unauthorized copies of the database, punitive damages, and attorneys' fees.

While not perfect, for the library, research, and scholarly community this bill represents considerable improvement over earlier bills. For example, past bills would have allowed database owners to prevent individuals from using or extracting information from a database and appeared to give database producers control over uncopyrightable facts. The current bill is concerned with data misappropriation.

Proponents say that database piracy is a significant problem that must be corrected. The Coalition Against Database Piracy (CADP) represents 85 international and U.S.-based publishers and trade groups such as the American Intellectual Property Association, Software and Information Industry Association, and the Newsletter and Electronic Publishers Association. CADP

believes database piracy is more of a threat to the Internet than is any proposed legislation to correct the problem.[2]

Groups that oppose the bill assert that there is no demonstrated need for such legislation. They state that existing federal copyright and anti-hacking laws, along with state contract and tort laws, provide ample protection for databases. The Database Coalition consists of a large number of groups ranging from the major online service providers (such as Verizon and Yahoo) to the American Civil Liberties Union, the Digital Future Coalition, the Electronic Frontier Foundation, the National Academy of Sciences, and major library associations.[3] Many fear that the legislation would increase the growing monopolization in the information marketplace.

The library community continues to oppose database legislation. A statement issued by the five major library associations in mid-October 2003 stated that the building blocks of research continue to be in the public domain and that H.R. 3261 threatens this tradition. Library associations support open access as opposed to database protection. Moreover, the bill would extend the monopoly that currently plagues research journals, the prices of which have increased by almost 200 percent since the mid-1980s. The associations believe that such legislation will erode libraries' ability to provide the materials that their users need.[4]

The amended bill is before the full House Judiciary Committee. Despite the many improvements in this version of the bill, database protection remains controversial.

[1] 499 U.S. 340 (1991).

[2] See Coalition Against Database Piracy, at http://www.cadp.net/.

[3] Letter to Representatives Sensenbrenner and Tauzin, October 21, 2003, at http://www.sla.org/PDFs/SensenTauzin0903.pdf.

[4] Shared Legal Capability, "Library Community Opposes Bill to Restrict Access to Data," October 21, 2003, at http://www.arl.org/info/frn/copy/pressrelease102003.pdf.

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Executing A Library Move

by Catherine Dimenstein, MLS

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University of Arizona, on contract to IBM. She can be reached
at cdimenst@u.arizona.edu.

·········A Planned Approach to Moving Your Library

Out of Nowhere ...

Nine times out of ten, it will catch you by surprise: an executive walks into your library and announces, "We need this space for something else; you have to move the library." What do you do? How do you start such a monumental task?

In the 12 years I have been running the library at the Tucson site of IBM, I have moved it four times: twice into comparable space, and twice into significantly reduced space. Usually I get several months to plan; once I got less than two weeks. After four relocations, I have made an art of moving. Some of the things I learned along the way are peculiar to the corporation that owns the library, but many are not. This is especially true of the planning phase.

Before the Move: Planning Ahead

When faced with a library move, plan the components of the project ahead of time, step by logical step. Make a project plan; if an industrial engineer or move coordinator has been assigned to the project, work with that person on the plan. Think of all the tasks that have to be accomplished, put them in order, and assign target dates for the start and completion of each. Before you can do this, you will need to get certain information about your organization's moving process. Who is paying to move the library? What resources will be provided in the way of labor, packing materials, and so on? What forms need to be processed to get your phone and data connections moved? Can you hire a contractor or other extra help to pack the collection? All this information will feed your project plan and its execution.

If you are fortunate, you will have some input in the selection of a new space for your library. If you are less fortunate, you will be handed a drawing of a space and told to make it work. In either case, the more you can learn about the new space, the better you can plan both the move out of your current location and the move into the new one.

Most likely you will have an architect or industrial engineer to work with in planning how to fit your library into its new space. I will not attempt to cover the ins and outs of library design here, but I do offer these tips:

1 Remind your architect/industrial engineer of unique considerations for library design. See the sidebar, "Things Your Designer May Not Know About Libraries."

2 Use this opportunity to improve the layout of your facility. What in your current layout confuses or inhibits patrons? Do you have enough reading space? Display space? This is the time to make changes that improve access and efficiency.

3 Always approach library design from the customer's point of view! What works best for your patrons? What will they see when they first walk in the door? Don't hide popular items at the back of the library or in side alcoves.

4 It might be cost-effective for your company to invest in space-saving furniture and fixtures at this time. Is mobile shelving called for? Revolving magazine racks? Is there a better way to house your audiovisual collection?

5 Where are the utilities in the new space? The location of electrical outlets, phone and data ports, heating and cooling ducts all influence where you place furniture and fixtures. Windows and lighting are also a consideration: will tall bookstacks inhibit light distribution? In my last library move, I forgot to ask where the thermostat would be mounted. It turned up right where I planned to hang a bulletin board.

Designing the new space is my favorite part of moving a library. I experiment with layouts on paper, trying different arrangements to see how they work. Lacking a graphics program to do this on my computer, I use a sheet of graph paper with the footprint of the proposed space in a reasonable scale. (Your architect/industrial engineer can supply you with a scale drawing.) Next, I cut "paper doll" footprints of furniture and shuffle them around on the graph paper. When I get an arrangement I like, I tape down the pieces and make a photocopy. Then I unstick the footprints and start again.

Prepare Your Collection for Moving: Weeding

Libraries sometimes keep outdated and unused materials simply because it is cheaper to leave them there than to invest the time and thought in removing them. Now is the time to weed those things it doesn't pay to take with you. An automated circulation system can help: run a shelf list sorted by last checkout date to target unused monographs. You may be able to recover some dollars by

contacting a company that buys old textbooks, reference books, and indexes.

For serials, consider whether you get enough use out of those back issues to lug them to a new home, or whether it would be more efficient to rely on document delivery for access to archival journal articles. If you have a retention policy for serials that specifies the number of years they will be kept, do your end-of-year weeding before you move. If your organization has a recycling plan, ask if it will take your discarded serials.

Remember 16 mm films? Filmstrips? Are any media in your library obsolete, either because you don't have the equipment to access the information, or because your patrons are no longer interested in using it? Donate it or dump it, but don't plan to pack it.

Keep Your Patrons Informed

You and your staff are not the only ones disrupted by this move. Keep your patrons informed of impending changes in location, and in particular of any planned suspension of services. Put up signs in your current facility announcing the upcoming move. Leave signage after you have gone, directing people to your new location. Use your organization's bulletin boards, website, newsletter, e-mail, and other forms of communication to get the word out about your move.

Packing the Collection

Librarians know that packing materials in order saves inordinate amounts of time and labor when you unpack; but surprisingly, this is not always obvious to people outside the profession. Explain to your management that packing a library is nothing like packing an office. There are professional library moving companies you can contract, if time and budget allow. If not, find out what other resources your organization will provide.

If temporary help is available, be sure to ask for specialized skills; being able to lift 40 pounds is not the only qualification. I had the greatest success when I hired library school students: not only did they understand organizational concepts, but they knew the classification system. If they couldn't remember which handful of books went where, they just checked the call numbers. When I had to use unskilled temporary employees, I asked for people who could follow very specific directions. To my surprise, however, the packers had no notion of collection divisions such as reference, circulating, or audiovisual. They also had difficulty following the sequence of shelves: they started to pack all the top shelves first, then the second shelves. Explain your organizational system in detail, and check frequently to make sure your helpers haven't gotten off track.

Most library services will have to be suspended during packing. You might be able to staff e-mail reference, and of course, online materials will be available unless the server is being moved. But at some point you need to lock the library doors to minimize disruptions. If you have interlibrary loan partners, notify them that you will be

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unable to fill loan requests for the duration.

Standard packing boxes are impractical for moving library collections, but the kinds of containers you use may depend on what your organization will supply. I use large cartons (four feet wide by two feet deep by two feet high) that sit on half pallets, putting in layers of books with flattened packing boxes as "shelves" between layers. If you do this, be careful of tall items that may get smashed by the weight of the layer above. Always put the lid on the carton! Otherwise, passersby may assume the contents are up for adoption. Be mindful of the weight of loaded cartons; even if you could fill a box to four feet deep, will you have a forklift to move it, or will a laborer with a pallet jack have to haul it away?

The most creative way I have ever encountered for transporting library material to a new location was in college. The entire student body (500 to 600 students) was lined up in a great chain. We entered the old library on a prescribed route, received an armful of books off the shelf from a librarian, kept our place in line as we followed the route to the new library, and handed our armful of books–still in order–to a librarian there who put them on the new shelves. Of course, this only works when your new library has all new shelving, and you have a large conscripted labor force.

Having determined the kinds of containers to pack your collection in, decide on subsections of materials for packing (e.g., reference, circulating monographs, serials, media, confidential materials, archives, etc.). This is best done based on their physical arrangement. Assign an identifying letter to each subcollection, such as R = Reference, B = Books, J = Journals. Use the letters to tag the containers of materials, along with a sequential number to keep the boxes in order.

To estimate how many containers it will take to pack each subsection of your collection, calculate how many shelves of material will fit into a single container, then divide the total number of shelves in use by this number. Also estimate how many and what kind of containers will be required to pack your supplies, small fixtures, files, and other items that cannot be handled easily without packaging. Find out if the movers will move fully-loaded desks and file cabinets, or if the contents must be boxed

Things Your Designer May Not Know About Libraries

Even an architect or industrial engineer who has designed many office spaces may not be aware of the special design considerations for libraries. Be sure to call the following to your designer's attention:

• Books are heavy. Make sure the space you are moving into will bear the per square inch (psi) load of your bookstacks. If you use wall-mounted shelving, it must be anchored so that the weight of books does not pull mounting hardware out of the drywall.

• Ease of access, not how much stuff you can cram into a given space, drives library design. This includes specifications outlined in the Americans with Disabilities Act: for instance, wheelchair access requires not only ramps, but 36 inches of clearance between shelving units. If your space is not on the ground floor, there must be an elevator to allow access to that level.

• Growth room is required in the bookstacks, not only for adding materials, but for shelving returned items. It's a concept librarians take for granted, but one that may be foreign to your designer. Just because your shelves are only three-quarters full doesn't mean you can get by with 25 percent less shelf space!

separately. Desks, credenzas, and other office furniture are sometimes turned on end when being moved, so you may need to empty them. I strongly recommend you get boxes sized specifically for files. When you have made all your estimates, order enough of the appropriate containers to meet your needs.

Consider where all these containers will be "staged" as they are filled. Do you have space inside the library? Will shelf units need to be taken down as you go to create enough space? Sometimes containers can be staged in a corridor outside the library, but be careful not to block emergency evacuation routes. You may have to find an area elsewhere to which containers can be transported as they are filled. Also consider staging areas on the receiving end: where will those containers be dropped for you to unpack, and will you be able to shuffle them around to get at them in sequence? Give some thought to the security of staging areas, so your materials don't disappear in transit.

Congratulations! You are now ready to start packing.

The Mechanics: The Last Shall Be First

I recommend you start packing from the end of the collection toward the front. Place the last book in a subcollection in the upper right-hand corner of the bottom layer of the carton, then the next to last book on its left, and so on, in a row across the bottom of the container. Start the next row on the right and work toward the left. When you start to unpack a container, you will begin on the top layer with the book in the lower left-hand corner and work across to the right. This way, the books come out of the containers in correct sequence from right to left.

As you fill a container, be sure to tag it with the letter for that subcollection and a sequential number (e.g., R1, R2, R3, R4, J1, J2, J3, J4 etc.). When you finish a subcollection, record the final box number; when you unpack, you will start with that one and work back to Box 1. Do NOT mix subcollections in the same container.

Ergonomics

Books are heavy. Journals are even heavier. When physically packing the collection, be careful how you use your body. Pulled back muscles are an obvious danger, especially if you are bending over the side of a container to load it. But in fact, hands and elbows will probably

take the brunt of the abuse. Take breaks; shake out hands and arms frequently; don't throw all your weight on the same foot as you bend and stretch.

Computers and Other Equipment

For your computer workstations and other electronic equipment, be sure you understand which wires connect where, or mark them clearly. Bind all cords with wire ties or rubber bands to keep them out of the way. If possible, pack computers and their peripherals inside sturdy cartons for moving, with plenty of padding all around. (I use empty magazine boxes.) Mark these containers FRAGILE. Do not allow electronic equipment to be staged or stored where heat can cause damage.

Checking Out Your New Space

Before you move your library fixtures into their new home, do a walk-through of the space, just as you would if moving into a new residence. Defects and flaws may be easier to fix before the shelving goes up. Be sure everything works: lights, outlets, heating and cooling. Be sure the footprint is not radically different from the drawing you have, and that phone and data ports are where they need to be.

Check with the people assembling your shelving to see if they are familiar with the units. If you have lived with these shelving units for some time, no doubt you have acquired knowledge of how they go together–and more important, what might make them fall apart. Share this information with the assemblers; they don't want something to break or come crashing down any more than you do.

Put masking tape markings on the floor in the new space to guide the movers in placing the furniture and shelving. This will simplify their job and give you peace of mind that things won't be set up with 34 inches of clearance between stacks when you need 36 to meet Americans with Disability Act (ADA) requirements. Then, be on hand as the furniture is going in and the shelving is going up. The movers should have a drawing of the space, but I've had crews show up with an outdated one. I've also had them "eyeball" placement of the bookstacks rather than measuring, so I got extra floorspace where I didn't need it and not enough in the reading area.

Unpacking

If you packed by my method, everything now comes out of the containers in reverse order of the way it went in. Start with the highest-numbered container in the subcollection. Take materials from the lower left-hand corner of the top layer first. Once again, watch carefully if your assistants are not familiar with the classification system. Even when you are doing the work yourself, check call numbers frequently–you'd be amazed how easy it is to get a handful of books from the wrong row in the container. Leave enough growth room on each shelf that you won't have to do a shelf shift in three months.

Have a Party!

After your library is up and running in its new location, do a big publicity push on the change. Use every form of communication your company offers: newsletter, posters, website, e-mail, PA announcement. I believe in finding every excuse to celebrate in the library, so I suggest having an Open House and inviting everyone to the new location. Have food and games, give away bookmarks and pencils, raffle off door prizes! The vendors you deal with may be able to supply promotional trinkets to pass out, even if your budget won't allow it.

Send special invitations to senior executives in your organization, so they can see what you have accomplished. Have a guest book for people to sign, and be sure to leave a space for comments. Have fresh promotional literature with the library's current contact information, and use this event to talk about your services. Demonstrate online information tools. Schmooze with your customers.

After the Ball

Library traffic may drop off dramatically after your move. It will take people a while to find you and to incorporate your new location into their traffic patterns. You may see an increase in traffic surrounding your Grand Opening, as the curious come to see the new facility, but very likely it will drop off again afterwards. Don't be discouraged; any disruption in services and routines is apt to cause "avoidance" as people wait for things to settle down before coming to the library again. In the meantime, put your energies into making sure they know where to find you when they need you.

Moving a library is not easy, but it can be an exciting challenge. The opportunity to redesign for current needs and usage patterns can be a blessing in disguise. If you lose square footage in the process, take the hurdle boldly. Become a lean, mean information machine. After all, the collection is only one part of a library. The professional skills and creativity of the librarians are another essential part. Use them! ◉

brand talk

Maximizing Brand Recognition

By Chris Olson

Last month I reviewed how recent research into brain functions has provided insight into how memories are formed. This month's column follows up with a look at brand recognition, considered to be an important first step and a test for establishing a brand.

Quick. What do you recognize?

Look around your desk. What do you see? A coffee cup with a graphic on it? A coaster or perhaps a mouse pad in the shape of a CD? Recognizing these items involves visual cues stored in your memory. You've seen the item before and you're able to identify it based on features including shape, location, color, and size. Even the relationship the item has with another item provides your brain with recognition cues. The cup contains coffee and rests on a CD. How do you know the CD is a coaster and not an active CD? Visual cues. Without them, you could very well have spilled coffee on a critical CD. If this exercise has made you double-check the CD, then there weren't enough cues to distinguish the CD between a coaster and an archive. And therein lies an important branding lesson. Successful branding strategies manage and leverage feature cues to achieve brand recognition.

The process of recognition is a core component of branding. If a brand strategy doesn't employ visual or auditive cues, then establishing brand perceptions and evoking memories is a lot more difficult and complicated. Why? Because without cues, the brain has to rely solely on recall to remember a brand. Studies have shown that the brain's ability for recognition is greater than for recall. It's one of the reasons why a multiple choice quiz is easier than one requiring total recall.

Brand Recognition Cues

Go back to the coffee cup with the graphic. Is it a design you instantly recognize? What aspect of the design helps you to recognize it? The color? The shape? Perhaps you don't recognize the design, but you do recognize the typeface style. A brand strategy which employs the maximum number of recognition cues has an advantage over a competing brand using fewer cues. The more cues the higher the probability that the brand will be recognized by more people.

There are many cues in the brand recognition arsenal. Typically brand building begins with aesthetic cues, the design features in a graphic or logo meant to visually represent the brand. Color, shape, texture, style, typeface, and position are among the design attributes which can offer recognition cues, making a design visually distinctive. It's the reason why, when a new logo is evaluated, recognition factors and design uniqueness are taken into consideration.

Recognition cues aren't limited to visuals. Auditory signals can contribute to recognition by providing sound cues for a brand. How many of us now associate Hummer vehicles with the Happy Jack song sung by The Who? Can you say the AFLAC insurance company name without sounding like a duck?

Take Advantage of Recognition Cues

While it's true that a brand is more than a logo or an ad jingle, maximizing brand recognition by harnessing visual and auditive attributes increases the effectiveness of an entire brand management strategy. If the brand is not recognized then other brand activities have nothing upon which to build. Brand memories are constructed using a complex network of associative links. The strongest brands with high recognition rates are those that have established the largest number and clearest association memory links.

Information professionals establishing their brand would do well to aggressively manage as many visual and auditive cues as possible. Some information services aren't allowed to use a unique graphic or logo to represent themselves. This situation doesn't necessarily spell brand disaster, but instead dictates that other visual cues should be identified and then actively managed. A brand prevented from using a graphic symbol might use a distinctive typeface treatment or unique combination of colors. Color, when consistently defined and aptly applied, can be the primary cue which prompts people to recognize information products and services. If your branding strategy doesn't employ a full range of visual and auditive cues, brand recognition is still attainable; however, you will need patience and diligence before recognition measures reach satisfactory levels. If time is of the essence or the branding strategy is being driven by encroaching competition, then you'll need to deploy every brand recognition cue you can muster.

Attaining brand recognition in the target market is a critical milestone for any branding strategy. Take the time to audit your brand's visual and auditive recognition cues, measure current recognition levels, and implement remedial actions if needed. Remember, if your brand isn't recognized then perception-building brand activities won't be as effective as they could be.

Contact Chris Olson at brandtalk@sla.org

Developing a Customized Database of Users as a Tool for Marketing the Library

By Gabrielle D. Boudreau and Cynthia G. Manley

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······ A Database to Satisfy Customer Demand at ORNL

INTRODUCTION

Special libraries exist to provide services to customers within their organizations. They must provide resources and services that meet the specific needs of their parent organizations. This is an especially challenging task in the current environment of swiftly changing technology and shrinking budgets. Libraries must ensure that users are aware of the services and resources that are available, if they are to use them. In order to do this, many libraries employ marketing strategies and activities. Marketing has become an even more important activity in the electronic age, because library users tend to assume that information is free on the Web, and this assumption challenges librarians to demonstrate the value of their collections and services. Librarians recognize that to effectively market library services, they must anticipate customer demands and satisfy them before their competitors do.

Marketing consists of a series of activities that begin with identifying the needs of the individuals and groups that form the library's service community. The literature stresses several key steps for developing a successful marketing strategy. They include establishing a clear mission, gathering information about customers and their needs, establishing tactical plans, and monitoring the progress of strategies that have been implemented.

An important step in any marketing strategy is to research the needs of the service community and to match those needs with the competencies of the library, being very careful to set user expectations at a realistic level. Libraries have frequently gathered certain types of statistics, for example, the number of circulating books or volume of interlibrary loan. Some statistics, however, particularly in

the reference environment, have been more difficult for librarians to capture and analyze.

A selective review of the literature was helpful in identifying how library use has been measured. A variety of methods have been used to reveal how well libraries are serving their customers. These methods include circulation statistics, counts of attendance at library programs and workshops, Internet use, telephone renewal, and reference questions. The majority of libraries can get a statistical picture of their customers from circulation and interlibrary loan statistics, but they often cannot determine, in any specific detail, who is using reference services, how those services are being used, and which customers rely on which products. Such information becomes critical in a library that has a multi-faceted customer base. Services and products cannot be adapted effectively to meet the constantly changing customer base if that base remains undefined.

PURPOSE AND BACKGROUND

The ORNL library staff recognized that acquiring accurate and detailed information about library customers was the first step in the marketing process. This paper discusses the development of a database as a tool for collecting data about library customers to determine who uses the library and which services and products they use. Information compiled within the database can be used to create an individual customer profile or a profile of specific target groups that use the library. Specifically, the database was designed to track the results of reference interactions. Major objectives in developing this database were to find ways to promote all library services to the customer and to find ways to improve communication between the library and current and potential customers. When analyzed, these data, rich in customer details and preferences, would give the library the capability to target groups for specific educational or promotional efforts. Moreover, they would give library managers a tool for anticipating the needs of their customer base.

Since its inception in 1948, the library has helped the scientists and engineers at ORNL carry out research of national importance. ORNL is a multiprogram science and technology laboratory, and the library must ensure that its services and products meet the multiple research agendas of the laboratory and also provide information to members of the public who use the library. The laboratory is organized into 16 major divisions that are made up of 120 research groups focusing on different research areas. Because the library is supported through overhead funding, it must compete with other groups for resources.

Technological changes, shifts in research priorities, and decreased funding have affected the way the library serves its customers. In discussions with laboratory management about the library's effectiveness, librarians had strong anecdotal evidence that researchers valued reference services, but they could not provide any information about the groups that used library services and products most often. For reference services, the only statistical information available came from tick marks kept in a log at the reference desk. There was no qualitative information on the reference interaction, and the more protracted interactions involving librarians working on projects with researchers were not captured in the library's system. It proved difficult to justify funding for reference services or to market to customers who used the library infrequently.

The library staff recognized that a link exists between satisfied customers and library services, and in 1999 they became more actively involved in trying to improve customer service. It quickly became clear that in order to improve customer service and meet customers' needs, they needed precise information about the customers who used the library. The library staff were also concerned about how to best utilize its resources. Allocation of staff time to the reference desk was an important consideration because inappropriate staffing levels can have undesirable consequences. Understaffing can be damaging because customers do not receive the service and assistance needed. Overstaffing can be damaging to a library's image if the groups being served perceive the library as over-staffed, particularly during times of economic stress.

It is essential for a library to know its customer base and to know which services and products they use. The library profession has always been concerned with collecting and analyzing statistics for decisionmaking. Knowing which resources and products are used allows librarians to manage the library more accurately. Our review of the literature gave us some insights regarding how other libraries collected and analyzed data for decisionmaking and some of the marketing strategies they

used. We wanted to systematically gather pertinent data about library users and their interactions with library resources and products. Specifically, we wanted to know more about the services and products our customers used rather than the book and interlibrary loan orders they were placing. We wanted to gain some idea regarding the success and quality of our reference interactions, not only anecdotally, but statistically as well. Such information is a powerful tool when making a budgetary case for change.

The Customer Registry Database was conceived to gather this information. It was designed as a database subset that could handle the input and output on reference services and customer activity within the existing library automation system. It was critical to merge this information with our existing system because reporting mechanisms were already in place to track circulation and acquisition activity.

THE CUSTOMER REGISTRY DATABASE

The Customer Registry Database was designed to be a knowledge-based system that holds critical information about library customers—the systems they access, the requests they make, and the services they use. Reference services were a primary focus of the database because the library's automation system already captured many other customer interactions.

The library's automation system already contained basic information about all ORNL personnel who were potential library customers. Thus, it was a logical choice to work within the existing automation system, rather than create a separate database. In the past we had experimented with separately created databases for handling electronic reference or reference interactions. We found that the main impediment for the librarians was that the database was not integrated into existing systems and therefore not part of the normal workflow.

Once the decision was made to use the existing library automation system, it was necessary to program functionality into the system to allow for handling the electronic reference services, reference desk inquiries, and patron usage of other library services. There were several requirements and design features that the database would need to incorporate. It needed above all to be easy for the staff to use, as they would be manually entering some of the data. Pull-down menus allowed for easy data input. These menus included selections regarding the nature of the question, the type of user (internal or external), and the type of interaction (telephone or walk-in). The standardized categories included in the menus described specific interactions, such as reference, product instruction, renewal assistance, and report retrieval. The standardized categories were helpful when reporting out from the database.

A critical function of the database was how it would handle the tracking and transmittal of electronic reference requests. These requests had been handled through a shared library e-mail account, but this failed to provide

tracking of completed requests and system reporting. It was also not tied to the customer patron activity record in our automation system. The new database would remedy all of these deficiencies and provide much more consistent handling of electronic reference requests. Some standardized "canned" responses were added to the database, which could be selected and modified to provide responses for the most repeated inquiries.

An additional requirement of the new database was that it tie interactions both to the individual customer and, in the case of reference interactions, to the individual librarian. This provided both accountability by the librarian and the ability to capture the types of reference queries received from customers. The database also allowed the librarians to distinguish between external and internal customers, so that we could capture the volume of external activity being handled by the library's reference services.

Menus within the existing library automation system were changed to incorporate the new database under the heading "Reference," which was added to the existing system menus: circulation, cataloging, serials, and acquisitions. Three new forms were added to capture reference desk interactions, electronic reference, and extended reference. A fourth link allowed the librarian to query the system by customer and generate a record of that activity. More detailed reports could be generated by the system administrator.

The database was designed to capture any usage of library systems and services. When inactive users moved to an active status, the registry could immediately generate an e-mail welcoming them to the library and inviting them to share topics of interest, so that they might then receive more customized information delivery. This allowed the librarians to know which part of the library's customer base was composed of active customers and to note changes within the customer base.

The librarian who supported the customer's area of research could then be notified, so that an initial personal visit could be arranged. The librarian could also initiate new customer contacts by searching the registry by research division for inactive users, so that they might be made aware of the services the library had to offer.

The registry was designed to capture specific information on customers' usage of all library services, so that it would be easy to see where potential gaps existed and to offer the customer more tailored information that might be useful. The registry also provided a statistical picture of which systems were getting used and who were the primary users.

A customer information component of the library's automation system was modified to expand the basic information that is kept for each customer. The individual customer information was modified automatically by the system as the customer accessed and used library systems. Some information had to be input manually by the librarian when a customer contacted the library reference

desk by phone or in person. It was hoped that this database input would be less onerous for the librarians than previous attempts, as they were already working within the library automation system. Forms were designed requiring minimal data entry to encourage library staff use.

Library management could use the same system to see which research divisions were using the library's services and systems and to then make adjustments to those services and collections in a timely way. Managers would have a tool for being more responsive to the customer base and targeting new customers. They could also more easily justify the costs of services based on usage.

LESSONS LEARNED

One difficulty, recognized throughout this project, was our heavy reliance on customized programming. Tying the database into the existing library automation system rather than creating a standalone database added to the complexity of our task. Customized programming is expensive, and the support that an automation systems vendor can provide was not available.

Another difficulty, which is always tied to gathering reference statistics, is that the process can never be totally automated. There is always a certain amount of input necessary from the librarians who manage a reference interaction. Any time there is manual input, there is the potential for data being omitted, and some changes in procedures and workflow are required. A major cultural change for the librarians was the need to query all reference desk customers for names or badge numbers. While this is a standard procedure in many businesses, it was not a welcome addition to the librarian's workflow at the reference desk. This step was critical, however, if we were going to complete the picture of which customers used our reference services.

The most difficult part of creating the Customer Registry Database was incorporating data on customer usage of third-party vendor systems. The third-party systems had to be linked on a case-by-case basis. Most library databases did not require an individual logon because they were site-licensed and therefore authenticated by IP domain. This presented difficulties in tying individual usage to a specific database. While general usage statistics for databases were being gathered, we had not identified the specific customer base for each product. In order to link individual use to specific database products, IP domain addresses for each machine using a database were captured and converted to an individual customer name within the library automation system. This information promised to enrich the data on overall library usage and give a specific picture of database usage, comparable to circulation statistics.

CONCLUSION

Two years after implementing the Customer Registry Database, we have concluded that although the effort involved in creating a database to gather customer data was a worthwhile endeavor, it required an enormous amount of customized programming, which raised concerns about associated costs. Also, toward the later stages of the project, library management began discussions about moving to a new library system. In spite of the complexities involved, our experience with the design and implementation of the Customer Registry Database gave us valuable insights regarding the kind of capabilities we would like to incorporate within any new library automation system we acquire.

Customer service plays a critical role in the delivery of library services. In the current environment of downsizing and outsourcing, librarians must be able to satisfy their customers' needs if they are to convince management that they deserve continued funding. The ability to gather the data needed to accomplish this task is essential and ongoing. ◗

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index of advertisers

coming events

January 2004

Association for Library and Information Science Education (ALISE)
January 6-9
Philadelphia, PA, USA
http://www.alise.org/conferences/index.shtml

ALA Midwinter
January 9-14
San Diego, CA, USA
www.ala.org/events/midwinter2003/

Joint Meeting with CALL (Chicago Association of Law Libraries)
January 13
Chicago, IL USA
http://www.sla.org/calendar

Digital Information Exchange: Pathways to Build Global Information Society
January 21-23
New Delhi, India
http://www.cenlib.iitm.ac.in/sis2004/index.html

SLA Leadership Summit
January 22-24
Albuquerque, NM
http://www.sla.org/calendar

DC/SLA Book Club discusses
January 22
Washington, DC
http://www.sla.org/chapter/cdc/bookclub.html

Building Communities of Practice (COPs) for Knowledge Exchange: Roles for Information Professionals
January 23
Anywhere in US and Canada
http://www.sla.org/vitrualseminar

Bringing the Web to the User: An introduction to RSS
January 27
Cincinnati, OH USA
http://www.sla.org/calendar

February 2004

Work/Life Balance: Common Pressures & Coping Strategies
February 4
Anywhere in US and Canada
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March 2004

Building Partnerships & Alliances: Success Strategies for Info Pros
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Chapter Meeting & Guest Speakers Priscilla Schultz and Bridget MacMillan
March 9
Saint Louis Metropolitan Area
http://www.sla.org/calendar

Intranet Research, Analysis & Marketing : Now That You've Built It-Get Them to Come
March 17
Anywhere in US and Canada
http://www.sla.org/virtualseminar

SCIP
March 22-25
Boston, MA, USA
http://www.scip.org/boston/index.asp

Association for Population/Family Planning Libraries and Information Centers International - 37th Annual Meeting
March 29-31
Boston, MA
http://www.aplici.org/about/about.htm

April 2004

Exploring Alternative Careers
April 7
Anywhere in US and Canada
http://www.sla.org/careerdevelopment

Joint Spring Conference
April 14-16
Barren River State Park, KY
http://www.sla.org/calendar

Meaningful Measurement Systems: Linking Performance Measures from Organizational through to Employees
April 21
Anywhere in US and Canada
http://www.sla.org/vitrualseminar

May 2004

Annual Illinois Chapter Business Meeting
May 5
Chicago, IL USA
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The Influential Networker
May 5
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Maryland Chapter Annual Business Meeting
May 18
Baltimore, MD USA
http://www.sla.org/calendar

Web Design & Usability : Tips, Techniques & Best Practices
May 19
Anywhere in US and Canada
http://www.sla.org/vitrualseminar

Medical Library Association (MLA)
May 21-26
Washington, DC, USA
http://www.mlanet.org/am/index.html

June 2004

SLA Annual Conference
June 5-10
Nashville, TN USA
http://www.sla.org/nashville2004

July 2004

Collaborative Techniques: Tips & Best Practices for Working in Team
July 7
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American Association of Law Libraries (AALL)
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