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FORGING A NEW
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NET NEUTRALITY · TECHNOLOGICAL UNEMPLOYMENT

Federal Agency Approves Net Neutrality Rules

Internet service providers (ISPs) would become subject to regulations that will prohibit them from discriminating among different types of content or content providers, under a rule proposed in February by the U.S. Federal Communications Commission (FCC).

The FCC, by a 3-2 vote, approved a proposal to reclassify ISPs (such as Verizon and Comcast) as public utilities and subject them to the same regulations that govern telephone companies. Under this proposal, ISPs would be prohibited from blocking or slowing the transmission of content and could not enter into "paid prioritization" deals, in which they receive payment in exchange for providing faster transmission.

The proposal was cheered by advocates of Net neutrality, the principle (sometimes called "open Internet") that Internet networks should treat all types of legal content equally. Currently, ISPs are classified as "information services" and are beyond the FCC's jurisdiction, but a federal court ruled in January 2014 that the agency has the authority to implement Net neutrality rules if doing so would promote broadband deployment across the United States. Later that year, President Barack Obama weighed in on the topic, creating a video endorsing Net neutrality regulations.

To make the case for treating ISPs as public utilities, the FCC relied upon Title II of the Communications Act of 1934, which was developed to regulate the burgeoning Bell telephone system.

Opponents of the proposal say that subjecting a 21st century technology to a law developed 80 years ago will stifle the innovation and creativity that have made the Internet a dynamic and popular medium in a short period of time. Setting limits on Internet activity will, they say, inhibit ISPs from introducing new services and improving their networks. Some opponents also are critical of the regulatory process the FCC followed, noting that Chairman Tom Wheeler had initially voiced skepticism about Net neutrality, then appeared to change his mind after President Obama went public with his support of the concept.

The FCC said the regulations will be posted online as quickly as possible and subsequently published in the *Federal Register*. They will become effective 60 days after publication. Some ISPs are weighing legal challenges to the proposal, which could delay its implementation.

Technological Advances May Threaten Entire Occupations

As the world's economies continue their years-long struggle to regain their footing, many unemployed and underemployed workers are giving up hope that their previous jobs will return. But if futurist Thomas Frey is correct, not only jobs but entire occupations may disappear as more advances are made in technology and robotics.

"If you've not heard the phrase 'technological unemployment,' brace yourself; you'll be hearing it a lot over the coming years," Frey wrote recently in his blog, *FuturistSpeaker.com*. "Technology is automating jobs out of existence at a record clip, and it's only getting started."

Frey, senior futurist at the DaVinci Institute in Louisville, Colorado, identified 101 occupations that are at risk from just seven innovations. Although librarian and information professional are not among those occupations, they support several that are endangered.

By far the most destructive technology is artificial intelligence (AI), which could eliminate as many as 30 occupations, many of them in the medical and financial services fields. Flying drones (20 occupations), robots (16), driverless cars (15), mass energy storage (9), contour crafting (6), and 3D printers (5) round out the list of job killers.

Frey acknowledges, however, that these same technologies could easily create more jobs and occupations than they destroy.

"For each of the endangered jobs, I can easily come up with several logical offshoots that may amount to a net increase in jobs," he wrote. "As an example, traditional lawyers may transition into super-lawyers handling 10x the caseload of lawyers today. Limo drivers may become fleet operators managing 50-100 cars at a time. Painters may become conductors of paint symphonies, with robot painters completing entire houses in less than an hour."

Frey also believes that people who possess skill sets and characteristics that cannot easily be duplicated by technology will thrive in an increasingly automated world.

"For those well attuned to the top three skills needed for the future—adaptability, flexibility, and resourcefulness—there will be more opportunities than they can possibly imagine," he wrote. "This is precisely the shift in perspective we're about to go through as the tools at our disposal begin to increase our capabilities exponentially."

To learn which occupations Frey considers endangered by technological advances, visit http://www.futuristspeaker.com/2014/11/101-endangered-jobs-by-2030/.

2016 BOARD CANDIDATES ·

Magnoni, Reczek Top Slate of 2016 Board Candidates

Dee Magnoni and Karen Kreizman Reczek have accepted calls to run for SLA president-elect for 2016, topping a slate of eight candidates who are vying for four open positions.

Dee Magnoni

Dee first joined SLA in 1992 and has been involved in several chapters and divisions, including the Leadership & Management Division (LMD), which she chaired in 2011. She is the research library director at the Los Alamos National Laboratory in Los Alamos, New Mexico.

Karen Kreizman Reczek

Karen, who joined SLA in 1988, currently chairs the LMD and was a founding member and chair of the Competitive Intelligence Division. She

is the program manager of Standards Information Services at the National Institute of Standards and Technology in Gaithersburg, Maryland.

Both candidates are Fellows of SLA, and both have chaired Annual Conference Advisory Councils.

In addition to selecting a president-elect for 2016, SLA members will also choose among the following candidates for three other board offices:

Treasurer
• Nicholas Collison
• Juanita Richardson

Chapter Cabinet Chair-elect
• Barbara Fullerton
• Mary Talley Garcia

Division Cabinet Chair-elect
• Deborah Keller
• Tom Nielsen

The candidates will serve three-year terms on the board if elected. SLA members will have the opportunity to meet the candidates at the upcoming SLA 2015 Annual Conference & INFO-EXPO. The election will be held electronically in September 2015.

Shamel, de Stricker to Serve as 'Change Agents'

Cindy Shamel and Ulla de Stricker, who between them have been members of SLA for more than 40 years, have been engaged by the SLA Board of Directors to act as "change agents" to help keep SLA moving forward until a permanent executive is hired.

The two are information and knowledge management consultants who run their own businesses—Cindy in California and Ulla in Toronto—but have collaborated on projects in the past. They will report regularly to the SLA Board and the Executive Committee on their progress in identifying opportunities in the areas of marketplace positioning and viability, membership and revenue growth, organizational struc-

ture, and conference modeling.

Cindy and Ulla were selected from among five individuals and teams who expressed interest in working with the SLA Board and staff to develop and implement ideas to maximize benefits to members. They were recommended to the SLA Board by a Transition Committee assembled in 2014 by then-SLA President Kate Arnold. The committee was formed to help ensure a smooth progression to new operational leadership.

The committee members are Tom Rink, SLA's president-elect; John DiGilio, SLA's treasurer; Tara Murray, past division cabinet chair on the SLA Board; Debbie Schachter, a former member of the SLA Board; and Bill Noorlander, a member of SLA's Finance Committee.

With the hiring of Ulla and Cindy, the Transition Committee will now turn its attention to fulfilling its other responsibilities, as follows:

• To prepare a plan for hiring a new executive officer, including a recommendation on the charge for a Search Committee;

• To develop a draft compensation and executive officer review policy; and

• To develop a communications plan in collaboration with SLA staff.

More information about the transition process and the change agents is available on SLA's Website at https://www.sla.org/governance/board-of-directors/key-initiatives/.

SLA Honors Three Up-and-Coming Info Pros

Two academic librarians and an information architect at a design firm will be honored as Rising Stars at SLA's 2015 Annual Conference & INFO-EXPO.

Susmita Chakraborty, Christine Coughlan, and Kathleen Lehman are the latest recipients of the Rising Star Award, which is presented annually to

CHANGE AGENTS · RISING STARS

recognize outstanding new SLA members who show exceptional promise of leadership and contribution to the association and the information profession. Nominees must have one to five years of professional experience as an information professional and have been an SLA member for five years or less. They must also have met at least one of the following criteria:

- Performed outstanding work and professional activities on behalf of SLA;
- Developed notable innovations on the job;
- Actively participated in SLA units and association programs; or
- Promoted the visibility of SLA or the value of information professionals.

The three Rising Stars will be recognized at the opening session of SLA 2015 on Sunday, June 14. The conference is expected to draw 2,000-plus information industry professionals and will include more than 200 sessions, business meetings, networking events, and other activities.

Susmita is an assistant professor in the Department of Library and Information Science at the University of Calcutta in India. Since joining SLA in 2011, she has served as a director and secretary of the association's Asia Chapter, co-presented a poster at the SLA 2014 Annual Conference, and contributed articles to the *Sci-Tech News*, the newsletter of SLA's Science-Technology Division. She will be speaking about knowledge management at SLA 2015 as part of a panel discussion on transforming international science and technology librarianship.

In addition to her master's degree in library science, Susmita holds a master's degree in digital library management and a doctorate in medical informatics. She has presented numerous papers at conferences and written several articles for journals, edited two books and three annual literary collec-

tions, and contributed chapters to a few books. During the course of her career, she has visited more than 20 countries to discuss her research and further the advancement of her profession.

Susmita Chakraborty

Christine Coughlan

Kathleen Lehman

Christine (Chris) is an information architect with the Aten Design Group in Denver, Colorado. After joining SLA in February 2012 while in library school at the University of Denver, she quickly distinguished herself as a leader, serving as president-elect of the SLA Rocky Mountain Chapter in 2013 and president in 2014. While president, she took the lead in planning the Western States Chapters Reception at the SLA 2014 Annual Conference in Vancouver, Canada, making arrangements with vendors, recruiting and assigning volunteers, and coordinating the event with presidents of other SLA chapters.

Chris is a member of SLA's Information Technology Division and User Experience Caucus, reflecting her interests in information architecture and user-centered design. She has presented on these topics at several events. Through her work at Aten Design, she has led projects for clients such as Human Rights Watch and the World Wildlife Fund.

Kathleen, the head of the Physics Library at the University of Arkansas, joined SLA in 2010 and quickly made her mark, receiving a travel scholarship to attend the association's 2011 Annual Conference in Philadelphia. The scholarship was sponsored in part by SLA's Physics-Astronomy-Mathematics (PAM) Division, of which Kathleen is secretary this year, having previously chaired its Awards Committee and Nominations and Elections Committee.

Kathleen has presented several conference papers on topics ranging from open access to QR codes. She has also submitted articles for publication in library journals; her article "Reviews of Science for Science Libraries: Graphene," published in the February 2011 issue of *Science & Technology Libraries*, was one of the most downloaded articles from *S&TL* that year. **SLA**

Forging a New Identity for Your Library

THE WORK THAT PEOPLE AND ORGANIZATIONS PERFORM IS FUNDAMENTAL TO THEIR IDENTITY AND SPEAKS TO THE VALUE THEY BELIEVE THEY CREATE FOR THEIR STAKEHOLDERS.

BY STUART HALES

In the 1950s and 1960s, one of the most popular television shows in the United States was "What's My Line?" The show featured a panel of celebrities who tried to determine the occupation of an anonymous guest by asking questions that could be answered with either a "yes" or a "no." Based on the answers, the panelists would try to identify whether the guest was a plumber, a chauffeur, a librarian—the possibilities were endless, and the occupations often unexpected.

The show was successful partly because of the personalities of the host and panelists, and partly because of the variety of occupations showcased. (The show once featured a guest who made breadboxes, and when panelist Dorothy Kilgallen asked whether the product he made was "bigger than a breadbox"—a

question popularized by fellow panelist Steve Allen—host John Charles Daly could not refrain from bursting into laughter.)

But the show also resonated with audiences because it tapped into a fundamental truth about humans, which is that many of us identify more strongly with our work than with any other aspect of our identity. "What do you do?" is a staple of small talk at social gatherings, and many people continue working long after they reach retirement age because it reinforces their sense of personal identity.

Just as people derive much of their identity from their work, organizations do as well. They are known for the products they make, the services they provide, and the benefits they offer, and they go to considerable lengths to make them stand out. From BMW's

"The Ultimate Driving Machine" to Disneyland's "The Happiest Place on Earth" to Energizer's "They Keep Going and Going and …," organizations convey their identities by creating mental and emotional images of the results of their work.

Departments and units within organizations do so as well. Yesterday's Human Resources Department is today's Talent Recruitment and Retention Office, while the Call Center of the 20th century is the Customer Solutions Desk of the 21st. The functions—and, thus, the core identity—may stay essentially the same, but the name receives a makeover so the department can appear more strategic or better aligned with the parent organization's mission.

Libraries and librarians have not been shy about playing the renaming game. Libraries have become information centers and resource centers, while librarians have become research analysts, business information architects, and Web content managers. Some of these name changes are purely cosmetic, while others represent honest attempts to more accurately describe the work being performed or the services or benefits being provided.

STUART HALES is publications editor at SLA and editor of *Information Outlook*. He can be reached at shales@sla.org.

But what if a library wants to change its identity by providing different services and meeting different needs? What impact will that have on its staff, its customers, and its parent organization? How should it communicate that change, and what steps are involved in the transition?

In "Creating an Open Data Portal," authors Norma Palomino and Rodrigo Calloni describe the steps they took to shift the identity of the Felipe Herrera Library at the Inter-American Development Bank (IDB) from a *disseminator of information* to a *creator of content*. The seeds of this initiative were planted at the library's Reference Desk, where library staff noticed they were unable to meet the needs of a growing number of users.

"These users would approach our Reference Desk looking for data sets that had been generated previously by technical teams within the organization, but the data simply could not be located," the authors write. "We realized there was a need for a centralized repository of the bank's data. Such a repository would allow our staff members to have a one-stop experience in generating, curating and sharing (with both internal and external audiences) the unique socioeconomic development data created by the IDB's technical experts."

Over the course of several months, the authors and their fellow library staff obtained buy-in and funding from senior management and then worked to bring the bank's socioeconomic specialists and researchers on board. By the end of this process, the bank's main database gatekeepers had become supporters of the project and were providing full access to their repositories to enable the creation of a single platform.

The result, according to the authors, was not only a new identity for the library, but also heightened respect for the library staff.

"Before developing this platform, we were seen as administrators of knowledge products that had been created externally and were accessible by subscription," Palomino and Calloni write.

"Now we are perceived as creators of a valuable and unique content-driven product, which positions us to have one-on-one dialogues with researchers. This new library identity also benefits the larger organization by introducing a new knowledge creation partner, the librarian, who can help make sense of scientific data and present innovative content through dynamic visualization. We are proud of the product we have created, and we eagerly look forward to the new organizational dynamics that will present themselves as a result of this shift in our identity."

The process of creating and communicating a new identity was successful at the Felipe Herrera Library in large part because the project tapped into that same "fundamental truth" that drives so much of human identity—work. In his article "Using Identity to Build Relevance," identity strategist Jon Schleuning asserts that the value a library creates for its organization through its work is what makes its identity relevant.

"Identity … is about your DNA. It is the essence of who you are, what you do, and why you matter," he writes. "Building an identity is not simply about creating a new name, logo, and colorful Website, although those may be tools for expression; rather, it is about finding meaning and creating relevance for your organization. Crafting a relevant identity requires deep internal exploration and candid assessment—in essence, thinking about the possibilities of what you will become and where you will be in the future."

Schleuning argues that information professionals who are contemplating an identity change for their library or information center should consider at least five factors before taking any action.

"For your identity to be successful, it needs to work across several dimensions," he writes. "It needs to be *authentic* to who you are, *believable* in its promise, *motivational* to the people who encounter it, *sustainable* over time, and *valuable*, in that it demonstrates a worthwhile value for its investment."

To learn more about forging a new identity for your library or information center, turn the page. **SLA**

Creating an Open Data Portal

SHIFTING FROM AN INFORMATION DISSEMINATION ROLE TO A CONTENT CREATION
ROLE ADDED VALUE TO A LIBRARY AND TO ITS PARENT ORGANIZATION AS WELL.

BY NORMA PALOMINO, MSIS, AND RODRIGO CALLONI, BLS

The Felipe Herrera Library is part of the Knowledge and Learning Department (KNL) at the Inter-American Development Bank (IDB), an international, multi-government organization that supports the governments of Latin American and Caribbean countries in reducing poverty and inequality and improving lives in the region. The KNL is the gateway department that fosters the production and dissemination of the bank's knowledge among IDB staff and people in the region.

Since 2010, the authors and their co-workers have shifted the focus of the library's services several times to add value to the larger organization's strategic agenda. We have redesigned our Website, built mobile-friendly apps to improve access to the library's electronic subscriptions, assumed stewardship of the IDB's publications, and appointed embedded librarians to better serve our clients, who are IDB's sector and economic technical teams. With all of these improvements securely in place, we decided it was time for us to move away from delivering off-the-shelf content and toward creating our own content-loaded product, thereby bringing to the fore the most sought-after intellectual asset in the region: open data.

Where's My Data?

Just as every organization continuously shifts its priorities to adjust to and prepare for changes in the market, the IDB library team was looking for real opportunities to add value and align our services with the bank's evolving operations. By being attentive to users' needs, our team identified a service gap that was affecting a variety of users within the bank. These users would approach our Reference Desk looking

NORMA PALOMINO is the chief of library services at the Inter-American Development Bank in Washington, D.C. Her responsibilities encompass not only traditional library programs but also the coordination of the bank's publications and knowledge repository and, more recently, the institutional open data platform. She is currently a doctoral candidate at Syracuse University, with a research focus on big data and predictive analytics topics. Norma can be reached at npalomino@iadb.org. **RODRIGO CALLONI** is the system librarian at the Inter-American Development Bank, where he works primarily in building the technological connections between the bank's library systems and its clients. His work has included redesigning and maintaining the library, publications and data center Websites, customizing and integrating information platforms, and designing visual interfaces for data sense-making. Prior to joining the bank, he worked at Ex Libris's London and São Paulo offices. He can be reached at rcalloni@iadb.org.

for data sets that had been generated previously by technical teams within the organization, but the data simply could not be located. We realized there was a need for a centralized repository of the bank's data. Such a repository would allow our staff members to have a one-stop experience in generating, curating and sharing (with both internal and external audiences) the unique socio-economic development data created by the IDB's technical experts.

Additionally, a scan and analysis of the current business landscape made it apparent that implementing open data portals to release data to the public (as a commitment to transparency and accountability) was a growing trend in similar organizations (i.e., international financial institutions). We used this finding as leverage to try to convince management of the relevance of this project to the institution's strategic goals—sharing the bank's intellectual assets with clients in the region and becoming an even more transparent institution.

We needed to persuade the IDB's leadership that making a different type of contribution to the overall organization and to policy makers and academic communities in the region would add value to the bank's work and help it remain relevant. To gain their support, we started an "influence campaign" of engaging in formal and casual conversations, sharing articles about open data initiatives, highlighting news about competing organizations that had already taken big steps toward releasing data openly, and more.

Management responded by providing us with a small budget to hire a consultant whose initial job was to deliver an assessment and sustainability report for building an open data Web platform. We made some phone calls and visits to other institutions to find the right person for the job—Vilas Mandlekar, a former member of the World Bank who had participated in several of its open data initiatives.

During this time, some institutional changes occurred within the IDB. One change was the appointment of a new

department manager, who loved our idea to develop a new identity. With full support from our manager and from Vilas Mandlekar, whose assessment and report confirmed our direction, we held several conversations with the bank's vice president for sectors and knowledge, who agreed to sponsor the project. We were ready to go!

Negotiating and Building Trust

After gaining support from management and obtaining funding for the project, we started the lengthy process of negotiating with the technical teams of socio-economic specialists and researchers to gain access to existing data sets. The IDB's technical teams were data generators, and although they fully supported the project at first, they began having second thoughts when it came down to actually contributing their data to the platform. Their reluctance was understandable—we were librarians, not economists or sector specialists, and they wondered who would get credit for the project if all of the data were lumped together. We tackled these issues and concerns by conducting a fully participative and transparent process: we asked the data creators (we called them "data partners") to work with us to determine fundamental components of the project so we could gain their trust.

At this point, the library, which was already contributing to the visibility of the IDB's intellectual products by supporting the dissemination of its publications, was starting to position itself as the focal point for generating and promoting the richness of the bank's data. By the end of the negotiating process, the four major database gatekeepers had become partners in and supporters of the project and were providing full access to their data repositories so as to create a single platform. The representatives from each contributing database became members of the steering committee, which was created and led by the library.

The process of creating the open data Web platform involved choosing the right technological infrastructure

and architecture as well as identifying unique features that could differentiate the platform from other open data Websites. Our open data expert, Vilas Mandlekar, was an invaluable asset during this process. Based on his guidance, we decided to combine sets of indicators from the four contributing databases into a single "one-stop shop" and include interactive and dynamic visualizations as the prime innovative feature. This platform will give users the opportunity to compare and correlate socioeconomic indicators from a variety of development aspects, ranging from countries' social characteristics (such as rural education rates or the number of female-headed families) to macro-economic factors such as exports of goods and remittances.

During this process, for reasons unrelated to the project, one of our data partners had to drop out, leaving three data sources: Sociometro (social data), INTrade (trade and commerce), and Latin Macro Watch (macroeconomic indicators). Around this time, we selected an open data management platform, Socrata, to host the additional data sets that were and are being built by IDB specialists. Socrata showcases state-of-the-art data manipulation tools and allows users to generate custom-made graphic and geographic visualizations while navigating the platform.

Designing the Platform

Based on conversations with the IDB's Office of External Relations, which monitors social media and Web users' behavior, we decided to design the open data Website with two audiences in mind: socioeconomic development practitioners and the general public (who are able to access the IDB's knowledge products through mass media and social media outlets).Consequently, the Website's home page is split into two sections:

- **In-Depth Research** is a data-driven section that provides full access to raw data for systems developers and research practitioners from academia and government agencies. It

features indicators and topic searches as well as navigation by specific indicator or country. A basic graphic-builder tool is also available, allowing users to create quick comparisons of trends and to cross-tabulate indicators.

• **Interact and Explore** features a set of innovative and interactive visualizations, most notably a report titled "Country at a Glance." The visual representation of the data allows users to "mouse over and discover" by taking advantage of colors and familiar shapes. The format enables users to make sense of highly technical data that otherwise is difficult for non-experts to understand.

Finally, as part of the project, the IDB's vice president of sectors and knowledge requested the creation of a policy manual that will set quality standards for the contribution of data to the platform, such as having complete metadata and using Creative Commons Inter-Governmental Organizations (CC-IGO) licenses. The library is leading the development of this policy in collaboration with sector and economic experts.

The open data platform, known as "Numbers for Development," will be released this year. It has been pre-launched to external audiences through a buzzword campaign (see accompanying infographic) and has already received positive feedback from economists and sector specialists in the region.

Through this initiative, the library has taken responsibility for, and assumed stewardship of, the bank's sector and economic data that are generated internally by technical experts. Furthermore, we have started to position ourselves as leaders in exploring innovative data visualization alternatives. In keeping with our new identity, we sponsored the first intensive courses in data visualization (using Tableau visualization software) at the IDB, which brought together diverse data experts and created synergies across the organization.

Marketing by Example

Word of mouth often proves to be the best marketing strategy, and people with first-hand experience who believe in your solution are powerful marketers for libraries. Once we got the ball rolling toward creating an open data platform, the phone started ringing and e-mails from data gatekeepers who wanted to participate in the project began filling our inboxes. Our data partners' enthusiastic work in sharing the news was very important in engaging other data curators, and the outreach agents in the KNL (our "business partners") helped us raise awareness of this new option for showcasing their data among internal clients. Notwithstanding all this, support from management has proven to be the most critical marketing element.

Perhaps the most strategic consequence of this project for the library is that the open data platform has created a new identity for the Felipe Herrera Library as a content product creator, eclipsing its traditional profile as an information disseminator. Before developing this platform, we were seen as administrators of knowledge products that had been created externally and were accessible by subscription. Now we are perceived as creators of a valuable and unique content-driven product, which positions us to have one-on-one dialogues with researchers.

This new library identity also benefits the larger organization by introducing a new knowledge creation partner, the librarian, who can help make sense of scientific data and present innovative content through dynamic visualization. We are proud of the product we have created, and we eagerly look forward to the new organizational dynamics that will present themselves as a result of this shift in our identity. **SLA**
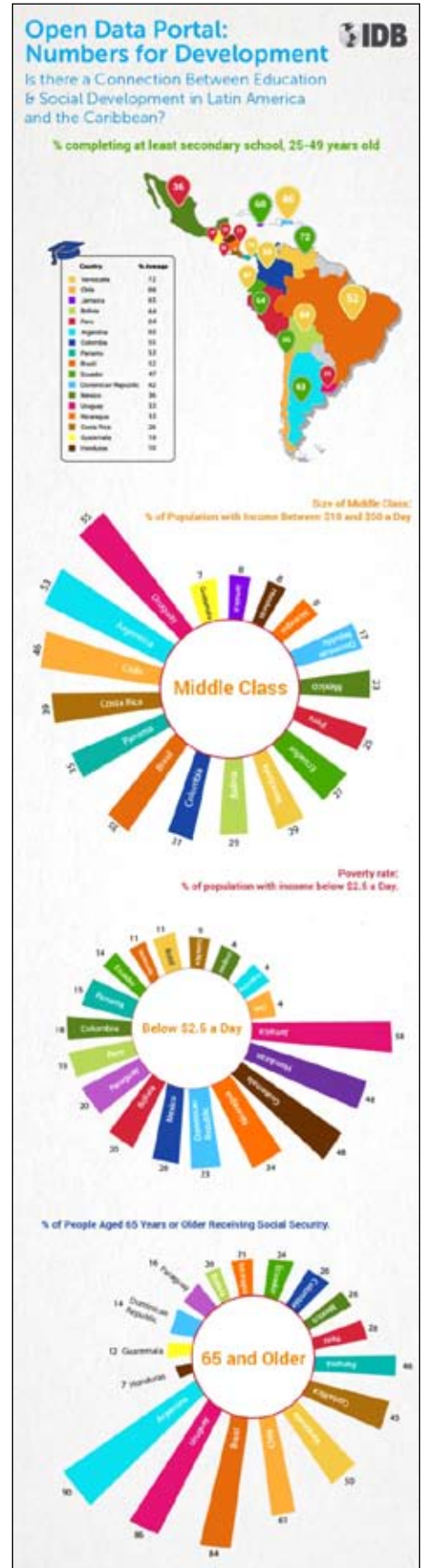
Using Identity to Build Relevance

ADOPTING A NEW IDENTITY IS A COMPLEX PROCESS THAT CAN CREATE OPPORTUNITIES FOR LIBRARIES AND INFORMATION CENTERS TO STRENGTHEN RELATIONSHIPS WITH KEY STAKEHOLDERS.

BY JON SCHLEUNING

We live in a world of rapid change. As information has increasingly gone digital and the technology promise of "any content, on any device, at any time" has become pervasive, the purpose of a library or information resource center has had to change as well. With these changes come critical questions: What is the library's role in the future? How can a library or information center remain relevant?

Since the advent of the Internet, search engines, and digitized content, many corporate and special libraries have struggled to prove their value and demonstrate that they are central to the success of their organizations. Some have tried to remake themselves into hubs of creativity and innovation, hosting hackfests and makerspace events; others have tried to position themselves as sharing platforms or competitive intelligence units. Ultimately, some of these efforts have been unsuccessful because they have been treated as promotional exercises rather than stra-

tegic efforts to identify and build a new identity.

Why, how, and when should one create a new identity?

Branding and identity, while often viewed as synonyms, are distinctly different. A brand can be thought of as a promise—what our users and audiences should expect every time they encounter our people, products or services. While critically important, branding is often driven by a desire to please and entice outside audiences. But if you only change the outward appearance of an organization, it is akin to merely changing the cover or digitizing the content of a book. The book itself isn't different, and if someone wasn't interested in the content before, a new

look or format isn't going to change that perception.

Identity, on the other hand, is about your DNA. It is the essence of who you are, what you do, and why you matter. Building an identity is not simply about creating a new name, logo, and colorful Website, although those may be tools for expression; rather, it is about finding meaning and creating relevance for your organization. Crafting a relevant identity requires deep internal exploration and candid assessment—in essence, thinking about the possibilities of what you will become and where you will be in the future.

For your identity to be successful, it needs to work across several dimensions. It needs to be *authentic* to who

JON SCHLEUNING is a senior associate with Marshall Strategy in San Francisco. He has worked on naming and identity projects for start-up companies, Fortune 100 corporations, and cultural and educational institutions. He can be reached at jon@marshallstrategy.com.

Ultimately, your identity should be a statement to the world of who you are and what you value.

you are, *believable* in its promise, *motivational* to the people who encounter it, *sustainable* over time, and *valuable*, in that it demonstrates a worthwhile value for its investment.

As identity consultants, my partners and I are often asked what steps organizations need to take when they develop a new identity. While every organization is different, typically there are three steps in the process: (1) assessment and understanding; (2) identity development; and (3) implementation and rollout. In our experience, when organizations jump immediately to identity development (often referred to as "rebranding"), they are often unsuccessful because they don't have a clear understanding of what they want to convey and the context in which they need to convey it.

Assessment and Understanding

Several key questions need to be asked during the assessment and understanding phase, including the following: What sets us apart? What do we want to be known for? Why should people care about what we do? What role do we play in the organization, now and in the future? What do people not know about us that they should?

During this phase, one should gather perspectives from both internal and external audiences. Internal audiences might include librarians and staff, heavy or longtime library users, and library administrators and senior management. Outside audiences might include librarians and information professionals from peer organizations, new hires to the organization who haven't encountered the library before, or people from other parts of the organization.

During this discovery phase, an audit of materials is essential—everything from the library's Website to signage,

promotional flyers, resource directories, and other touchpoints. An identity change is an opportunity to rethink how you interact with your users. The effort should involve much more than putting a new logo on old materials—it's an opportunity to reintroduce yourself to your audiences in ways that are fresh, relevant and compelling.

Within large organizations, the identity of a library or information resource center also needs to work within its institutional environment, complementing the personality and brand values of the organization and reflecting existing corporate guidelines. Rarely are library and resource centers standalone entities within an organization, so understanding the context that your identity needs to work within is vital to the success of the project. When talking with leaders and decision makers, it's important to understand their vision for the library in the future, the investment in time and resources they will make in the change, and how they will measure the success of the identity project.

Answers to the questions posed during the assessment will help frame the identity objectives that drive expression, such as naming and identity design. The process of answering them also engages stakeholders, garners the support of leadership, and provides a context for evaluating one's existing identity. Reaching agreement on identity objectives—agreement on what we want to convey¬—before undertaking development of the identity's expression is critical to the project's success. The objectives establish the criteria against which to evaluate alternatives.

Identity Development

An identity refresh requires re-evaluating your whole communication system and offers the opportunity to rethink

how and what you communicate to your audiences. Your name, messages and visual system (the elements that comprise your visual identity, such as your color palette) provide the visible, tangible expression of your identity. The resulting communication system should reflect your identity objectives, effectively convey them to your audiences, and form the foundation of a cohesive communications program and customer experience.

During the identity development stage, a range of visual and verbal alternatives is explored and shown within the context of key communication materials (such as Web pages, signage, and brochures). Within most institutions, demonstrating how the identity works within the larger system is also very important. This context helps set a clear stage for evaluation and helps bring the identity to life. It also demonstrates that one can't simply put a new logo on old materials.

Once alternatives have been reviewed and discussed by a small core team, a final direction is chosen. We've found that smaller decision-making groups are often more effective. Within large organizations, it may be important to also make sure the new identity works within the institutional brand guidelines.

When the final identity is approved, the artwork and language are refined, materials are produced, and guidelines are established for effective and consistent usage of the new program.

Implementation and Rollout

Knowledge gained during the assessment phase often informs the implementation and rollout—the audiences you need to reach, what they currently think of you, and what you need to communicate. Likewise, the different visual and verbal directions explored during the development phase can be supported with suggestions about how each might be launched and communicated in effective, efficient ways.

A new idea can be very powerful in the opportunities it creates. Ultimately, your identity should be a statement to the world of who you are and what

you value. The personality, identity and visual style should all be consistent with these principles and are essential to its expression. The whole organization needs to share responsibility for ensuring that the resulting expression and experience not only support, but help build, the identity going forward.

Case Study: The Mix at SFPL

One goal of the San Francisco Public Library (SFPL) is to develop technological and media literacy for the city's middle school and high school youths, many of whom don't have access to the technology and mentoring support that could help them succeed. The library is committing significant resources and space to build a state-of-the-art digital learning and media center expressly for teens. The new center, funded in part by a MacArthur grant, will be an innovative, youth-designed learning space where young adults can explore and create media and develop digital media skills as well as discover the library's more traditional knowledge resources.

Internally, the library had struggled with developing an identity that would resonate with the intent of the space, connect with a younger audience, and work well for outreach and fundraising. Naming exercises had been conducted during internal brainstorming sessions, but without clear criteria and a core idea against which to evaluate potential names, library staff had found it impossible to reach a consensus. On the development side, while people were generally supportive of the project, they had found it challenging to convey why the new space was worthy of investment.

The SFPL asked my firm to help them articulate the identity of the media center and develop a name and visual expression. After interviewing stakeholders (from teens to senior librarians to board members), we focused the mission of the center on the creativity, curiosity, and community that the new space is meant to embody. We identified the center as a "dynamic learning laboratory for young adults, designed to equip youth of all backgrounds with a foundation of media literacy and skills that foster independence and build confidence in their lives."

With the identity foundation in place, we had a concept to be visually and verbally expressed. The result was "The Mix at SFPL," a short and memorable name that expresses a youthful energy not usually associated with libraries. The new name emphasizes a dynamic community space where teens can create content and engage others, rather than simply grow up as digital consumers.

With a clear, overarching message and strong name, visual identity development was much easier to execute, and decisions were easier to make. The new visual identity has built excitement for The Mix among middle school and high school students across San Francisco, and the clear articulation of the center's focus and why it matters has helped the library secure additional corporate funding and community partnerships.

Creating a new identity, or evolving a current one, can be a challenging endeavor. Critically assessing and understanding not just what you do, but why your audiences should care, can be daunting and energizing at the same time. We often say that people will not be enthusiastic about things they don't understand. When you take the time to create that understanding and find ways to build relevance and appeal with your audience, you have the opportunity to express an identity that is not only true to who you are, but also engaging and relevant for years to come. **SLA**

10 Questions: Bob Kosovsky

BOB KOSOVSKY IS DEDICATED TO SHARING HIS KNOWLEDGE OF MUSIC, NOT JUST AS A LIBRARIAN BUT AS A TEACHER AND WIKIPEDIA EDITOR AND THROUGH SOCIAL MEDIA.

BY STUART HALES

If you're a fan of animated short films, you may have seen "Betty Boop for President," a seven-minute parody of U.S. presidential elections released in 1932. Betty and her opponent, Mr. Nobody, sing and dance their way through their respective campaigns, each trying to outdo the other by making empty promises.

If you haven't seen the film but want to know what it's about, ask a librarian—specifically, ask Bob Kosovsky. Bob knows a thing or two about short films, having written plot summaries about several of them for IMDb, the Internet Movie Database, a subsidiary of Amazon.com. In fact, Bob has contributed a considerable amount of information to the realm of public knowledge, much of it in his role as a contributing editor of Wikipedia.

Information Outlook spoke to Bob in the hours before Winter Storm Juno was expected to dump 12 to 18 inches of snow on the New York metropolitan area (only about half that amount eventually fell). He shared his thoughts about Wikipedia, working in the world's most famous public library, why he's an SLA member, and how teaching music theory helps him in his work.

You have bachelor's, master's, and doctoral degrees in music. When and how did you get interested in music?

It's a childhood thing—the earliest photographs of me beyond infancy show me with recordings. There's a photo of me at age 3 holding a 78-rpm recording, and I still know what that recording is. And there's another photo of me at age 4, and I know I was holding the original cast recording of "My Fair Lady."

I've been obsessed with music almost since I was born, which is unusual because no one else in my family really enjoys listening to music! But with me, it became an outlet—it sort of became my life. I started out playing the violin, but then switched to the piano at age 12 because I needed harmony. I still play the piano today—not professionally, but I practice and keep it up.

Between earning your master's and doctoral degrees in music, you earned a library degree. What prompted you to get that degree?

I was working toward my master's part-time and living in New York City, which is not cheap. I had gotten a job at the New York Public Library, where I work now—it was typical for the library to hire non-library people to do particular jobs. I was processing an archival collection, and while I was doing that, my father died. He had been supplying me with a steady source of income, and while I still had an income without him, I realized I needed to be on more stable financial footing.

In talking to people, it became very obvious to me that earning a library degree would be, compared to a PhD, a pretty simple thing to get. It would be

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over pretty quickly, in six semesters, and would form the basis of stable employment.

It goes without saying that I enjoyed working at the New York Public Library, even though at that time I only had a very specific task of processing that collection. So I selected the library degree in between the music degrees as a way of having a stable financial base. I knew I still wanted the PhD.

When and how did you hear about SLA?

Way after I had finished the library degree—I want to say it was around 2007—I saw an advertisement from the New York Chapter of SLA. Someone who was active in the chapter, maybe Roberta Piccoli, was giving a talk on branding. I went with a co-worker because we thought it would be interesting, and we were concerned about raising our profile.

So I went to that talk, and it was stupendous—absolutely stupendous! I was bowled over. Then I began going to the Website of SLA New York and the main SLA Website, and I thought, wow, this is what everybody else in the library world should be doing. Then, after going to a few more one-off talks and meeting people at receptions and networking events, I decided I wanted to be a part of it, so I joined.

There are other library associations out there, such as the Music Library Association, that seem more oriented toward your work and interests. Why do you stay with SLA, and what are the most important benefits you derive from membership?

I'm a member of the Music Library Association and some other library associations, but the music library organizations are much more geared to musicians than to librarians. I'd say many of the members of those associations are people who have been or are practicing musicians or have been involved in the music industry in a practical manner and have drifted toward the library profession as a way of harnessing their knowledge. You really have to know

Bob Kosovsky never tires of exploring the holdings of the New York Public Library. "The thrill never goes away," he says.

how music works, socially and technically, to be a music librarian.

As far as the American Library Association is concerned, it's a very broad umbrella with many disparate interest groups—they don't call them that—that specialize in various topics of librarianship. I'd say it's mostly a combination of public librarians and academic librarians. That's not what SLA is.

When I went to library school, I didn't know anything about libraries except from my job. I remember being told there are three types of libraries: public, academic, and special. And as soon as they said "for profit," I tuned them out—I didn't want to work for a bank or a corporation or something like that. It's not my thing.

But after broaching it through that initial SLA New York session and then attending other sessions, I started thinking that SLA is doing things that other library associations don't do—not with the same intensity and seriousness of purpose, anyway—to make sure that librarians are seen as integral parts of any kind of organizational structure. One of the things I get continuously from SLA is that a librarian is in an equal partnership with the other people in the organization. I've actually had an

opportunity—not through SLA, although it was one of our commonalities—to meet a couple of law librarians, and they've made it very clear that most lawyers would not be able to function if the library were not part of the law firm.

Even though it may be second nature to most people in SLA, it's not the same kind of attitude you get in ALA or other library organizations. And SLA, of course, gives you very specific tools for the way you address yourself. I can't remember which recent president said we're performing services—we don't have content. It seems like such a simple and obvious idea, but you don't hear it in an organization as big as ALA.

You're the curator of rare books and manuscripts for the Music Division of the New York Public Library, perhaps the most famous library in the world. After nearly 30 years there, is it just another place to work, or do you sometimes get goose bumps when you enter the building?

There are days when I have to sit at my desk for a long time, and when I realize I've been doing that for more than four or five hours, I deliberately get up and walk into the stacks, and I say to myself,

A segment of Bob Kosovsky's page on Wikipedia, which he edits in his spare time.

"I can't believe I work here!"

The thrill never goes away. Sometimes when I'm talking to people about Mozart or Beethoven and I mention that we have their actual sketches or compositions in our hands, I'll say it casually, but internally I'm always thrilled that I'm working in this incredible storehouse of knowledge. We have plenty of books and scores that other libraries have, but we also have plenty of materials that no one else in the entire world has. That never ceases to thrill me.

What's the most interesting project you've ever worked on? What made it so interesting?

About 20 years ago, we physically moved due to renovations, and when we were moving back, we realized we didn't have enough space for all of our books. So we had to barcode 67,000 books and musical scores in order to send them offsite.

I volunteered to lead the work flow. I came up with a bar coding procedure and macros and scripts for the computers to run, so that even if people were computer-shy, all they had to do was follow the sequence of buttons to push and they'd be able to barcode. It took us about two or three months, and it only involved about seven people—we didn't have any volunteers, just staff—and we did it.

Basically, I managed that entire project. It didn't require a lot of intellectual thought, but being able to see it through gave me a fabulous sense of confidence.

As far as more intellectual projects go, pretty much all the big archival collections I've processed were interesting. There were a couple of collections we archived that were so important that we processed them on the item level. Even though that may depart from what's considered acceptable archival process, all of the researchers who use those collections are very, very thankful.

So I would say that a project that combines those facets, something that requires both coordination and intellectual ability, provides me with the most satisfaction.

In addition to your job at the New York Public Library, you teach music theory and analysis at the Mannes New School for Music. What do you learn from teaching that helps you in your work as a librarian?

Every person learns in a different way. When you're teaching a class, you have to be able to address those differences—you have to be able to speak clearly, efficiently, and succinctly so that you make sense, but you aren't as verbose as you would be in writing.

Teaching is an incredibly important

tool, and I think librarians should consider it an obligation to put themselves into some kind of teaching situation at some point in their careers. It's a skill—it's not like knowledge, like two plus two equals four. Teaching is a skill, and you have to always work at it and practice it. You can't ever coast and assume, "Oh, I've done this before." It doesn't work that way. You have to be able to see what kinds of students you have, assess them quickly, articulate ideas to them, and see if the ideas take. And if it doesn't work, you have to rethink and rephrase your ideas and try to see things from the students' eyes.

I've been teaching for so long, since 1982, that I'm really spoiled. It's hard for me to go to a conference now and hear a speaker, because I'd say 95 percent of the people who speak at conferences don't know how to speak at conferences. So I'm sitting in my chair, trying to hear what they're saying, and I can't hear them or they're speaking in a way that's frustrating.

You're a Wikipedia editor and have contributed some content about music to the site. How do you think the library community feels about Wikipedia, and do you encourage other librarians to become Wikipedia editors as well?

My mission with Wikipedia is essentially to share knowledge. I sort of wear two Wikipedia hats: I think of Wikipedia as part of my job—although I don't edit Wikipedia content on my job—and I think of Wikipedia as a hobby I do at home.

When I hear someone today say, "Oh, Wikipedia, you can't trust their information," it tells me that this person is not entirely versed in what's going on in the contemporary world. I admit I'm biased—I've been a Wikipedia editor for over eight years. I've worked through it, and I've learned a lot. I don't wish to go up to an administrative level; I'm happy just being an editor.

A couple of years ago, you would often hear academics or newspaper reporters say you can't trust Wikipedia. But at the beginning of the year, the American Historical Association, which

I think has about 5,000 academics, met here in New York. I attended their meeting, and in four or five of the sessions, I heard Wikipedia mentioned—and in every single one of those sessions, it was mentioned in a positive light. No one was disparaging. Many people were saying, yes, use Wikipedia, it's a tool we can use to help our students learn. It may not be the be-all or end-all, but it's a great way to get started.

For librarians, I think it's different. I'd say librarians really should be involved in Wikipedia. It has evolved—it has fewer editors today than it did in its heyday around 2007 or 2008. I think the big economic collapse affected Wikipedia. People have dropped off.

There's a great opportunity now in that a lot of the basic material has been written, so more specialized information needs to be entered. The stuff I do to help my job is to enter information about our rare materials. For example, I've been steadily entering information on our most important music manuscripts. They're so valuable that we rarely let them out unless we have a professional scholar looking at them, but we have microfilm of them, and there are facsimiles of them published in various places. I definitely have noticed an increase in the amount of interest in them because of these Wikipedia entries.

And it's not just about having this information and putting it on Wikipedia for the entire world to see. For it to really be understood, you have to understand not just the subject but how it's networked, how it's connected to every other piece of knowledge. That's the whole thing with hyperlinks—for a topic to really be valuable, it's not just based on the topic itself, but how that topic is integrated into human knowledge, into Wikipedia itself.

For example, I know that one of the areas in which Wikipedia is lacking information is corporations. That's an excellent opportunity for members of SLA who work in corporations, either for-profit or nonprofit, to enter their corporations in Wikipedia in such a way as to make the world realize that everyone and everything are dependent on one

another.

So, yes, I think every librarian should consider it their obligation to contribute to Wikipedia. And you don't have to do it by writing articles—you can do it by amplifying bibliographies. Just finding sources and putting them in the proper articles is incredibly helpful.

I could go on and on about Wikipedia. Someday, if SLA wants to host a special session on Wikipedia, I'd be more than happy to talk about it!

You're active on SLA's Twitter chat (#SLAtalk) series. Do you use Twitter very often in your work at the New York Public Library?

Indirectly, yes. I have to tell you, I really like Twitter. Everyone has their likes and dislikes in social media. I use Facebook, but I'm not really very fond of it. I'm trying to get into Instagram. But Twitter is different. I click with it.

People complain sometimes that there's too much garbage on Twitter, too much silly stuff, but I don't find that. I specifically look for people who only tweet about things that are significant. I once heard a lecture at a Web 2.0 conference, and the presenter was talking about content management, so I decided to follow that person. After a day or two, I realized that this person was talking not just about content management but about personal things. It didn't interest me, so I unsubscribed immediately.

That's pretty much how I feel about people I follow, and it's how I feel about my own tweets. My life goes on, and I don't talk about it on Twitter. I talk about professional things—I talk about information I want to share, interesting Websites, new publications, new information that comes my way.

And I'm an intensely passionate believer in tweeting at conferences. A conference is held in one place at a specific time, and very few people the world over are going to attend that conference. By tweeting those conferences, you're not only extending the speakers' range to the entire world, you're making it possible for the entire world to share that knowledge.

As librarians, isn't that, in part, what we're about—to be able to spread knowledge? To be able to enhance people's lives by giving them access to knowledge? So, yes, I'm a passionate believer in tweeting at conferences, and I think everyone else who attends conferences and likes to tweet should do so as well.

If you could travel back in time, which musical era would you like to visit, and which musicians would you like to meet?

I'm sort of curious to see what Beethoven was like, although maybe from a distance. The one great composer I think I could get along with was Mozart. He had to deal with students, he had to deal with lots of people, he had to be a social person to get where he got—back then you depended on patronage, so he had to obtain patrons, and he did. So he probably would have been a decent person. And we know he spoke English!

As for musical eras, the late classical era and the early transition to the romantic period—say, 1780 to about 1800—is probably what I'd want to visit.

Working in music, I know that no composer is an ideal person. It seems to me that the greater the composer is, the less likeable he or she is as a human being! **SLA**

How to Exert Positive Influence

By following four basic principles, information professionals can have a positive impact on others' behaviors, opinions, and decisions.

BY VALERIA L. HUNTER

Have you participated in an SLA Twitter chat (#SLAtalk)? The hour-long chats have been growing in popularity since their launch in February 2013, with dozens of information professionals weighing in each month on topics ranging from incorporating mobile technology to proving the value of information services to being innovative and entrepreneurial.

Each chat is guided by a series of eight questions, but there is no limit to the number of concepts, ideas, and suggestions that participants can introduce. The March 2014 chat, for example, was devoted to alternative career paths, but the discussion included comments about being "pinned down" by job titles, building a portfolio of work skills, getting invited to clients' staff meetings, and "owning" roles such as project management, to name just four.

Given the richness of the conversations, it seemed fitting that a new column be created in Information Outlook to allow chat participants to delve into greater detail about some of their comments. In this inaugural installment of the column, Valeria Hunter discusses influence skills, which she called a "top competency" during the December 2014 #SLAtalk about interpersonal skills.

Imagine standing before a group of senior leaders of your organization, pitching your best idea to them. They invited you to this meeting, and as you speak, they listen intently and nod affirmatively. It's clear they are ready to implement your idea posthaste!

Influence is the effect you have on someone else's behavior, decisions, or opinions. Think about the people who have a positive effect on you. What actions and behaviors do these people exhibit that influence you? How do they communicate such that you listen, take heed, and adjust your opinions and decisions?

Consider the four principles of effective influence shown in Figure 1: focus on outcomes, find shared value, choose your approach, and be inquisitive. Your ability to communicate well and keep these four principles of effective influence in mind will put you well on the way to exerting positive influence on those around you.

Focus on outcomes: The outcome is the result you want to achieve. It is what will change and the value that will be added as a result of your influence.

Being clear about what you want to achieve allows you to plan your strategy for wielding influence. At the outset, the outcome focus is individual in nature—

for example, I want the senior managers to implement my great idea. That's an understandable outcome, but why should your idea be implemented?

Understanding what you want is important, but by itself it's not enough. Focusing only on your individually desired result is a surefire way to be ignored. An outcome focus is best when paired with the next principle—finding shared value.

Find shared value: Finding shared value is about understanding others' perspectives, needs and concerns so you can build a result aligned with your individual outcome. Articulating the shared value will encourage others' engagement and boost your ability to wield influence. You know your desired outcome, and when you articulate the shared value from the outcome, people begin to listen. You know what's in it for you, and now you're helping those you're influencing see what's in it for them.

Now you're ready to speak up, but wait—you need to be very selective in choosing your approach.

Choose your approach: There are two basic approaches to getting your message across: push tactics and pull tactics. You can push your outcome on others, or you can pull others toward your desired outcome.

While there is a place for both tactics, push tactics work best when you have authority or expertise to accompany the push. But regardless of your authority or expertise, push approaches can be overused and may cause resentment (or even feel like bullying). Pull approaches, on the other hand, invite

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engagement. Pull approaches "pull" resources from others.

Pull tactics are useful when you need ideas and support from others, and when you want buy-in and teamwork. But be careful—this approach can be overused, too. You may appear indecisive if you have the authority to make a decision or perform a task on your own but instead use pull techniques. It can also be disingenuous if you falsely use this approach, such as by asking for input from others when you've already made a decision.

Two push tactics commonly used are directing and reasoning. Directing is authoritative and commanding, as when you say, "What I need from this meeting is an implementation plan for my idea." Reasoning is authoritative and based on expertise or research, as in, "The data show that my idea is the best way forward." There is nothing wrong with these tactics, and they are appropriate in situations where you have the authority and information to use them.

Contrast these push tactics with two pull tactics that are commonly used: collaborating and visioning. Collaborating is inclusive, trusting, flexible and involving. For example, you may ask, "How do you understand the issues around implementing my idea?" and use the feedback to adjust the idea. Visioning is inspirational, motivational, energetic and creative. For example, you may suggest, "Imagine the improvement in results six months after we implement this idea." This tactic engages others and appeals to their feelings. Pull tactics work well when you don't have authority to push and are aligning with the shared values to put forward your desired outcome.

Now you're clear on your desired outcome, you've adjusted the message based on shared values, and you've presented your message using approaches. Next is the inevitable iterative feedback.

Be inquisitive: Be willing to be influenced by the feedback you receive. Suspend judgment on your idea and be curious about how others see the issues. Curiosity leads to breakthroughs, so listen, ask questions, and notice nonverbal signals. Ask high-value, open-ended questions. It takes a special level of interest to engage others, look for common interests, and work together to create higher shared value. Watch your own nonverbal language to ensure you are genuinely paying attention.

If you follow these steps, you can expect to receive some pushback. Value your point of view and respectfully advocate for your ideas. Remember, exerting your influence isn't a one-time event. Influence develops over time and is enhanced as relationships develop. Use these influence-building principles to help solidify your standing and increase opportunities for having your ideas heard and implemented.

Now, take a deep breath and another look at the first paragraph. Recognize that approach? It's easier than you think! **SLA**
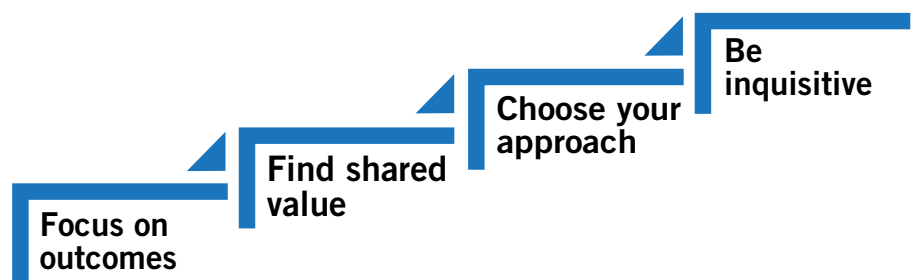
Focus on outcomes

Find shared value

Choose your approach

Be inquisitive

Figure 1: Four Principles of Effective Influence

Copyright Law and Cultural Festivals

Events promoting art, music or other types of cultural content pose many challenges for copyright and trademark protection.

BY LESLEY ELLEN HARRIS

If you are organizing a folk, art, or other type of cultural festival, protecting intellectual property (IP) should be part of your plans. As you may know, intellectual property is intangible property or intangible elements of a tangible work and includes patents, trademarks, and copyright. Each of these areas of IP is an important part of cultural festivals.

Due to their very nature, festivals have many IP-related aspects that need to be identified, managed, and protected. The program for the festival may be protected by copyright, and the festival's logo may be protected by trademark law. Content displayed or presented at the festival may be protected by copyright; in fact, there may also be underlying rights that need to be cleared. For example, if music is performed and the music belongs to someone other than the performer, the performer may need to get permission from the music composer and publisher.

Copyrights, Patents and Trademarks

According to Article 1, Section 8, Clause 8 of the U.S. Constitution, the purpose of copyright protection is "to promote the progress of science and useful arts, by securing for limited times to authors and inventors the exclusive right to their respective writings and discoveries." The U.S. Copyright Act specifically identifies literary, musical, and dramatic works, choreography, pictures and sculptures, movies, sound recordings, and architectural works "fixed in any tangible medium of expression" as eligible for protection. This protection extends to compilations and derivative works.

Copyright protection includes the exclusive rights to (1) reproduce or distribute a work, (2) sell, rent, lease, lend, or transfer ownership of the work, and (3) perform or display the work. It also protects moral rights, thus ensuring that the work cannot be altered in a way that injures the reputation of the author or creator.

The U.S. Patent and Trademark Office (USPTO) describes a trademark as "a word, phrase, symbol, and/or design that identifies and distinguishes the source of the goods of one party from those of another." It defines a patent as "a limited duration property right relating to an invention, granted by the USPTO in exchange for public disclosure of the invention." The agency differentiates trademarks and patents from copyright, which it describes as intended to protect "works of authorship, such as writings, music, and works of art that have been tangibly expressed." (http://www.uspto.gov/trademarks/basics/definitions.jsp)

Ensuring Protection

Participants in folk, art, or cultural festivals benefit personally and financially from copyright protection. For example, you wouldn't want to host a music festival that results in bootleg videos showing up on YouTube.

Copyright protection can be effected in several ways. First, your solicitation for vendors and exhibitors can include a mention that copyright protection strategies such as posted warnings and notices as well as onsite monitoring will be in place. The notices should state that taking still images or videos or making audio recordings of performances or displays is prohibited. While the use of a copyright symbol or copyright notice is not required under U.S. copyright law (or in most developed countries), including copyright symbols in festival literature and posting notices will alert attendees that copyright exists in the music being performed and/or art being displayed or sold.

Onsite monitoring could include instructing your staff in using appropriate procedures to identify and address potential infractions. Staff can watch for anyone using recording equipment, although this has become more difficult as recording equipment has become smaller and more portable. Staff also can intercede if they witness an infraction; appropriate measures might include asking someone using recording equipment to stop or simply notifying event security staff.

In addition to protecting the exhibitors and vendors participating in your festival, it's important to consider the framework that you, the organizer, construct in order to stage the event. Items used

LESLEY ELLEN HARRIS has spent her entire career in copyright law, as a lawyer-consultant, author, and educator. She developed the SLA Certificate in Copyright Management Program in 2007 and teaches the nine courses in the program. She has written four books and regularly blogs at www.copyrightlaws.com in plain English. She tweets at @Copyrightlaws.

to promote the event, solicit exhibitors and performers, and stage the event—posters, brochures, banners, advertising materials, and photos come to mind—could merit protection. Often, these materials require significant financial and temporal investments, so copyright protection is a valuable resource. Keep in mind that the festival's logo or any icon identifying the festival may deserve trademark protection as well.

Cultural and Ethical Interests

In 2005, the World Intellectual Property Organization (WIPO) published a paper on protecting cultural expressions and folklore. This document describes folklore as "a means of self expression and social identity" as well as "a living and still developing tradition" for developing countries. The paper likens unfair exploitation of folklore and folk art to "piratical activity" in that it "seriously prejudices the legitimate moral and economic interests of the communities" of origin.

The paper details the efforts of WIPO and others as early as 1967 to encourage international protection. Protections do not exist for folklore or folk art itself, and there are only tangential protections for folklore or fork art performances or fixed expressions. In the interest of fairness and respect, however, best practices are emerging for recognizing culturally sensitive materials that are not specifically protected. For example, WIPO's International Committee on Intellectual Property and Genetic Resources, Traditional Knowledge and Folklore (http://www.wipo.int/tk/en/igc) continues to pursue "balanced and appropriate legal and practical means to protect TK [traditional knowledge] and TCE [traditional cultural expression]."

Steps to Take

Education, communication, and planning are important elements of an effective copyright management strategy. Educate both yourself and festival staff so that they can readily identify copyright issues, understand the implications, address any concerns, and mitigate risk.

A festival checklist should include the following actions:

- Identify the festival's protectable assets and any potential cultural or ethical concerns.

- Determine acceptable uses of those assets.

- Communicate with your exhibitors and vendors to ensure you have permissions (licensing agreements) as needed.

- Advertise or post guidelines, notices, and warnings; monitor and curtail IP infringements as necessary. The Annex of WIPO's Intellectual Property and Folk, Arts and Cultural Festivals publication (www.wipo.int/edocs/pubdocs/en/wipo_pub_1043.pdf) contains examples of warnings and notices that offer some guidance.

Protecting the copyright interests of both the festival and its participants can help ensure both the short- and long-term success of your festival. **SLA**