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Information Outlook, March 2005

Special Libraries Association

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vol. 9, no. 3

March 2005

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How Can You Be a Manager?

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Management of Leadership

This month's issue of Information Outlook is devoted to management. I checked "manage," "managing," and "management" in the Merriam Webster Online Dictionary (www.merriam-webster.com) and found four definitions that are appropriate for this column. They are:

1. To handle or direct with a degree of skill
2. To work upon or try to alter for a purpose
3. To succeed in accomplishing
4. To direct the professional career of

As you may know, my presidential theme is Professional Development, and I've written about it in both the November 2004 and January 2005 issues of Information Outlook. This month, I'd like to share my thoughts on how we can best manage leadership, our own and that of our professional colleagues.

I often refer to management books for advice on how to handle a situation and for confirmation that my actions are appropriate. Here are excerpts from two of those books:

• Twyman L. Towery, *The Wisdom of Wolves*. Sourcebooks, Inc., 1997, 143 pages.

This book is divided into a number of chapters that deal with teamwork, patience, unity through uniqueness, curiosity, attitude, failure, communication, perseverance, strategy, play, death and survival, loyalty, and change. When I need to step back from a situation and let someone else take the lead, I remember how wolves travel.

"One of their favorite methods of travel is single file, one directly behind the other. The lead wolf expends the most energy. S/he is the trailblazer, crashing through the soft snow, allowing each succeeding wolf to conserve energy. When the lead wolf tires, s/he may drop off to the side and allow the next wolf to assume the lead position. The former lead wolf can now trail the other pack members, laboring less and regaining her/his strength for the challenges yet to come.... It is the same for successful organizations and families. Members must be prepared to not only carry their own load, but to assume greater leadership at any time. The viability of the organization may well depend on it. Wolves not only cooperate with each other, but also may work in harmony with other species to reach mutually desirable goals and sometimes just to have fun. "

Wolves know how "to handle or direct with a degree of skill."

• Wess Roberts and Bill Ross, *Leadership Lessons from Star Trek: The Next Generation - Make It So*. Pocket Books, 1995, 242 pages.

This is one of my all-time favorites. Some of you know that I'm an avid fan of the Star Trek television shows, movies, and books. Gene Roddenberry, the visionary behind the series, wrote some powerful screenplays that touched on leadership skills; working with and respecting people regardless of age, race, or culture; accepting other people's viewpoints; and remembering that every activity furthered the mission of the Federation:

"To explore new worlds, to seek out new life and new civilizations, to boldly go where no one has gone before."

Each chapter of the book analyzes episodes from the television series and provides examples of how a leader remains focused on the mission; takes initiative; displays competence; communicates well; understands how to use politics to his or her advantage; is intellectually honest; knows that we all must work interdependently; and, most important, is resilient in the face of changes in the environment. When my leadership abilities are put to the test, I reflect on these words:

"You must recognize that while you may be unjustly tried and judged by your peers, history will judge humanity, in part, by your actions: by how each of you applies your potential, by what you make of your possibilities, by what you do with your discoveries, by your respect for others, by how well you understand others and how well you help them understand you, and by how you react to the unknown. Indeed, the trial of humanity never ends."

The stories in this book show us how "to succeed in accomplishing."

I use books such as those two to direct my professional career and help me fulfill my leadership responsibilities. It is important to remember that each of us is a leader. We do not have to manage people or be president of an association or the chair of a SLA unit to be a leader. Each of us is responsible for our own destiny, and we need to use the tools available to us, either through our places of employment or through the SLA Online University, to develop and manage our leadership skills. Enjoy the articles in this issue of *Information Outlook*. In the words of John Lennon, "Life is what happens to you while you're busy making other plans."

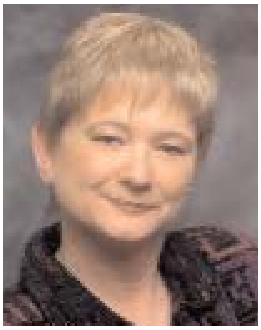
Speak to you again in May.

Make it so!

Ethel M. Salonen

Ethel M. Salonen

SLA President



web sites worth a click

By Carolyn J. Sosnowski, MLIS

Pew Internet and American Life Project

www.pewinternet.org/index.asp

This project, which is part of the Pew Research Center, produces reports that delve into the impact of the Internet on various aspects of American society. The ever-growing collection of full-text reports, which dates to 2000, is categorized into 11 areas, including demographics, education, online activities and pursuits, and public policy. Content is based on survey results, interviews, and research, and provides interesting information (and eye-catching statistics) about our electronic lives. Recent releases on blogging and search engine users provide insight into practices and trends that affect information professionals, and that may even inspire us. The archive is browsable by area, publication year, and author, and is also keyword searchable.

Social Security Administration: Popular Baby Names

www.ssa.gov/OACT/babynames

This site is pure fun. Want to see how popular your name is (and was)? Looking for a baby name that isn't so trendy? Although you can only get the top 10 names by gender prior to 1990, the top 1000 names are available from 1990 through 2003. Other data are broken out by decade (back to the beginning of the 20th century) and based on a 5% sample. You can also search the database for rankings in each state. Interesting note: Emily has ranked in the top 10 for girls since 1991 and has been the top pick since 1996. Most popular among the boys in recent years? Jacob.

Baseball Almanac

www.baseball-almanac.com

Just in time for the beginning of the baseball season, here is a searchable treasure trove of statistics, stories, and other diversions. If you need to settle a friendly disagreement, this is the site for you. There are more than 1,000 pages covering topics like ballpark dimensions and attendance rates, baseball movies, related players, and poetry. Yes, poetry. Unfortunately, there are just a few mentions of the All-American Girls Professional Baseball League of the post-World War II era, but there is good coverage of the Negro League throughout the site.

news briefs

NIH Policy Seeks Open Journals

A new National Institutes of Health policy is designed to accelerate the public's access to published articles resulting from NIH-funded research.

The policy – the first of its kind for NIH – calls on scientists to release to the public manuscripts from research supported by NIH as soon as possible, and within 12 months of final publication.

These peer-reviewed, NIH-funded research publications will be available in a Web-based archive to be managed by the National Library of Medicine, a component of NIH.

A NIH press release said the online archive is designed to increase the public's access to health-related publications at a time when demand for such information is on a steady rise.

The NIH release said the policy will achieve several important goals, including:

- Creating a stable archive of peer-reviewed research publications resulting from NIH-funded studies to ensure their permanent preservations.
- Securing a searchable compendium of these research publications that NIH and its awardees can use to manage more efficiently and to understand better their research portfolios, monitor scientific productivity, and, ultimately, help set research priorities.
- Making published results of NIH-funded research more readily accessible to the public, health care providers, educators, and scientists.

Beginning May 2, the policy requests that NIH-funded scientists submit an electronic version of the author's final manuscript upon acceptance for publication. The author's final manuscript is defined as the final version accepted for journal publication, and includes all modifications from the publishing peer review process.

The policy gives authors the flexibility to designate a specific time frame for public release - ranging from immediate public access after final publication to a 12- month delay - when they submit their manuscripts to NIH. Authors will be strongly encouraged to exercise their right to specify that their articles will be publicly available through PubMed Central as soon as possible.

PubMed (http://www.pubmedcentral.nih.gov), a part of the NIH National Library of Medicine, is the agency's digital repository of full-text, peer-reviewed biomedical, behavioral, and clinical research journals. It is a publicly accessible, stable, permanent, and searchable electronic archive.

The release of this policy follows months of intensive deliberations with representatives of patient and scientific organizations, researchers, and publishers. NIH posted the draft policy for public comment in September 2004, and received and reviewed more than 6,000 public comments.

Additional information on the new policy and related documents can be found at www.nih.gov/about/publicaccess/index.htm.

news briefs

Web Site Features African American Migration

In Motion: The African-American Migration Experience, a new Web site, includes more than 16,500 pages of information on the peoples, places, and the events that have shaped African America's migration traditions of the past 400 years.

Created by New York Public Library's Schomburg Center for Research in Black Culture, the site makes accessible to the general public essays, books, articles, manuscripts, illustrations, lesson plans, and maps.

The project is made possible in part by a $2.4 million dollar grant from the Institute of Museum and Library Services with the support of the Congressional Black Caucus.

Other project components include the book *In Motion: The African-American Migration Experience*, released by National Geographic in January; a Black History Month education kit composed of illustrations, and photographs, maps, lesson plans, and a bibliography; and an exhibition at the Schomburg Center.

Through images, maps, narratives, and music, the exhibition presents, chronicles, and interprets the migratory movements that have formed and transformed the African-American community and the nation in the last century. The site is www.inmotionaame.org.

New Web Site on Cataloging

The Library of Congress has launched a Web-based learning center to promote core competency curriculum development for cataloging practitioners.

The Cataloger's Learning Workshop (www.loc.gov/catworkshop) is a cataloging and metadata training resource portal that features a discussion group, links to cataloging training providers and publishers, online training courses, and suggested readings in bibliographic control. It is hosted by the Cataloging Distribution Service (CDS) of the Library of Congress.

The workshop grew out of an effort that began at the 2000 Library of Congress conference "Bibliographic Control for the New Millennium." Conferees produced an action plan with several ambitious goals, such as providing appropriate training and education to improve bibliographic control of Web resources.

A number of groups have been working with the Library of Congress to bring the Cataloger's Learning Workshop to reality, including the Association for Library Collections and Technical Services (ALCTS), a division of the American Library Association, and the Program for Cooperative Cataloging.

A number of workshops and curricula are being developed in Web bibliographic control training and continuing education. Training materials distribution is handled by CDS, while workshop organization and support logistics are managed through ALCTS and other organizations.

web sites worth a click

The Toronto Star Restaurant Reviews

www.thestar.com/restaurants

If you are planning to attend the SLA 2005 Annual Conference, don't forget to check out local reviews of Toronto and area restaurants. From the looks of the reviews that are posted, conference-goers will have plenty of interesting and tasty choices for dining. Many of the recent articles describe the fare in Toronto's ethnic restaurants, for which the city is known. Each starred review is accompanied by information about cost, location, phone number, wheelchair access, and restaurant size, the latter being handy for making reservations for your chapter or division event or a hosted dinner.

Tasting Wine

www.tasting-wine.com

Not sure at what temperature to serve sparkling wine? (It's different even from white wine.) Want to impress your friends with your new wine vocabulary? (You can use the word "flabby" without insulting someone.) This user-friendly and informative site covers the basics from glass shapes to savoring the tasting experience. The extensive glossary will help beginners translate what they taste into words, and the color chart will make you realize how many shades of red there are! A link to a related site explores grape varieties, ordering wine in a restaurant, and reading labels. With the information on this site, you'll be able to set up a tasting of your own and visit a wine shop with confidence.

Carolyn Sosnowski, MLIS, is an information specialist at SLA.

EBSCO Founder Dies at 93

Elton Bryson Stephens, founder and chairman emeritus of EBSCO Industries Inc., died in February. He was 93.

Mr. Stephens spent a lifetime advancing the arts, health, finance and banking, education and community in Alabama. His support of Alabama institutions of art and higher education includes the establishment of the EBSCO Endowed Chair of Library Service at the University of Alabama School of Library and Information Studies, the first endowed library chair in the U.S.

More recently, he gifted Birmingham-Southern College with the Elton B. Stephens Science Center. He began his college education there at age 17.

He and his wife helped establish the Alys Robinson Stephens Performing Arts Center, named for her and located on the campus of the University of Alabama at Birmingham. In the early 1990s, Mr. Stephens personally launched a campaign to revive the Alabama Symphony from insolvency. This succeeded, and today the symphony operates with a multi-million dollar endowment.

In 1932, Mr. Stephens graduated from Birmingham-Southern College. He earned his law degree from the University of Alabama School of Law in 1936. He held honorary doctorate degrees from Birmingham-Southern (Doctor of Laws) and the University of Alabama (Doctor of Humane Letters). He was named Outstanding Alabama Corporate Citizen in 1989.

In 1944, Mr. Stephens and his wife formed a partnership to sell esprit de corps and recreational supplies, including magazine subscriptions, to the U.S. Armed Forces.

Today, EBSCO is a collection of more than 30 business units with 5,000 employees active internationally in information services, publisher services, real estate development and manufacturing.

Mr. Stephens' many writings to his second family of EBSCO personnel include:

"Don't, whatever you do, neglect a customer. Devote your entire energies and time while on the job, and off the job if necessary, to give the service so necessary for customer satisfaction."

Libraries Win ACRL Awards

Three institutions of higher learning have received a 2005 Excellence in Academic Libraries Award from the Association of College and Research Libraries (ACRL).

The honor recognizes the staffs of a college, a university, and a community college library for programs that deliver exemplary services and resources to further the educational mission of the institution.

Mount Holyoke College, located in South Hadley, Massachusetts, won the college category. Also receiving awards were the Pierce College Library, Lakewood and Puyallup, Washington, the winner of the community college category, and the University of Virginia Library, Charlottesville, Virginia., the winner of the university category.

Each winning library receives $3,000 and a plaque, presented at an award ceremony held on each recipient's campus. The winners also will receive special recognition at the ACRL President's Program during the 2005 American Library Association Annual Conference.

ACRL, based in Chicago, Illinois, is a division of the American Library Association.

You're the Expert
Share What You Know

Here Are *Information Outlook*'s Major Topics for 2005

We're always looking for new authors for *Information Outlook*. That's one way we get new ideas, learn new ways of doing things.

The editorial calendar below shows major topics we want to cover for each issue in 2005.

Please note: The editorial calendar is only a starting point. We need more articles on more topics than we've listed below.

If you want to write on a topic that isn't on the calendar, or on a topic that isn't listed for a particular issue, we want to hear from you. For example, articles on topics like marketing, searching, and technology will be welcome throughout the year. We want to hear all of your ideas for articles.

Also, our descriptions of the topics may not fit your approach. If you have a different idea for a topic, let us know.

June

E-publishing.

July

Searching.

August

Global networking. How have you built your network of fellow professionals? How has it helped you succeed?

E-publishing.

September

Knowledge management. In an information-based economy, how is your organization getting the most out of all its intellectual capital?

October

Marketing library services.

November

Trends in library design. A library is more than a collection of books and periodicals. How can design make a difference for your clients? Or, with increasing digitization of information, are the days of physical libraries nearly through?

E-publishing.

December

Purchasing. How do you get the best deal for your company's information needs?

Deadlines

In general, we need to receive completed articles six weeks prior to the month of publication: for example, October 15 for the December issue.

However, we prefer that authors inquire before submitting a manuscript. If you are writing for a particular issue, your query should be early enough to allow for writing the article.

For more information on writing for *Information Outlook*, see www.sla.org/content/Shop/Information/writingforio.cfm, or write jadams@sla.org.

SLA
Connecting People and Information

Focus on Ethics and the Bottom Line

By Debbie Schachter

The question of ethics in the workplace has been much discussed recently, largely as a result of the spectacular ethical failures of some prominent corporations in the past several years. The extreme level of those ethical failures (to the level of criminality) has led to a broad-based debate on business ethics, corporate governance, and general business and accounting practices. Who is promoting ethical behavior in organizations and who is ensuring that business leaders comply?

The meaning of the word is fairly broad. The Concise Oxford Dictionary defines "ethics" as "the moral principles governing or influencing conduct."[1] Generally, in society, ethics and moral principles are linked in meaning, if not in application.

Because of the detrimental effect of the unethical behavior of executives and managers in high-profile and influential organizations in recent years, it is important that everyone working in the corporate world review her or his understanding of ethics in the workplace. As leaders in our organizations, we must show an interest in the organization's development and promotion of ethical behavior among its managers and staff. As librarians, we must seek to align our professional and personal ethics with the corporate ethics of our employers.

Librarianship has always held to a high standard of ethical conduct in its professional practice. Most library and information sciences associations, such as ALA, have developed codes of ethics or codes of practice for their members. SLA has not developed a code of ethical practice specifically for special librarians; instead, SLA refers information professionals to other library and information-based association guidelines.

SLA did not develop a code of practice for special librarians because "members have felt that their organizational environments have set the work ethics by which they are guided rather than a professional organization."[2] Special librarians have a number of professional practice responsibilities, including responsibilities to our organizations, our customers, and society in general. Not all business professions that information professionals work with or supply services to have codes of ethics, however, as executive and managerial behavior in some organizations has demonstrated.

Special librarians and information professionals take responsibility for upholding the ethical practices of their profession as well as the ethical codes of their organizations, if those organizations have formalized practices. Broadly speaking, ethical behavior should be non-contradictory between the professional and business spheres, although emphases may differ. For example, the competitive nature of our business organizations does not allow for sharing information as broadly as we naturally would working in a public or academic library. There is a certain tension for librarianship in the corporate environment. Librarianship is traditionally about collecting and disseminating information, although in practice this may be for specific user groups. In the corporate world, privacy concerns, protecting information from competitors, and even competitive internal behaviors are the reality.

The Librarian's Role

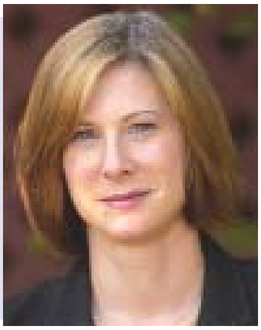
What are the effects for the individual special librarian?

In the place of business, ethical behavior needs to be promoted and developed by all its leaders. The librarian leads within the organization as a manager or supervisor and an information professional: "[B]usinesses can no longer afford to assume that ethical leadership will exist without a conscious, deliberate effort to make it a reality."[3] Employees want to see their managers and executives behaving ethically in their relationships with customers, staff, and shareholders. By making ourselves aware of ethical codes of practice in the organization or aligned with our professional associations, we can ensure that we take our leadership responsibility seriously.

Does your organization have a code of ethical conduct, or is it so focused on the bottom line that the unwritten sentiment is? "Everyone else does it, so why shouldn't we?" A competitive marketplace means that an organization must earn a significant profit, year after year, to satisfy its owners (the shareholders) and ensure its long-term survival. This drive for profit is taken to extremes when individuals at high levels of responsibility within the organization behave in a manner that compromises their own business's ethical practice policies. To develop an ethical culture, all managers, throughout the organization, must emphasize and model personal accountability.[4]

If a staff member has a question about ethical conduct for example, accepting gifts from suppliers is someone in the company available to answer it? Often these policies reside with the human resources department, but managers and employees alike are unaware of them. Or maybe there is no such pol-

Debbie Schachter has a master's degree in library science and a master's degree in business administration. She is the Head of Strategic Planning and Development at the British Columbia Courthouse Library Society, where she is involved in planning and managing organization-wide projects, marketing and communications, Web site management, and branch supervision. Schachter has more than 14 years of experience in management and supervision, technology planning and support, and reference service in special library settings. She can be contacted at dschachter@bccls.bc.ca.



icy in your organization. Our profession has a long history of developed ethical codes of practice: don't hesitate to offer your expertise to your human resources department if they are interested in developing an ethical code.

As a manager in an organization, it is important to model ethical behavior, for the sake of the organization and, especially, for the sake of the staff who report to you. This can be done very simply by behaving well to all staff and colleagues. "Ethics is not only honesty, justice and fairness but also treating people with dignity and respect. Think well of people even if you do not think well of their ideas and efforts."[5] Staff members want to see their organization's executives and managers behaving ethically and succeeding in their endeavors. Ethical behavior increases staff loyalty. For long-term prosperity, it makes sense to emphasize these positive qualities in your organization.

It is also important to behave ethically for the sake of your current and future career prospects. As a manager and leader, you must always be perceived as an honest and positive role model. One ethical slip can destroy your reputation in your organization or your profession. Even if your organization does not emphasize ethics or an ethical code of conduct, you can protect your reputation through best practices. Ensure that you are aware of your organization's ethical practices and educate yourself on existing professional codes of conduct for librarians and information professionals.

[1]The Concise Oxford Dictionary, 10th edition, 1999.
[2]SLA Web site (www.sla.org).
[3]Patten, p. 1.
[4]Patten, p. 1.
[5]McCallum, p. 1.

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How Can You Be a Manager? You're a Solo!

By Carol Simon

Traditional management theory teaches that to be a manager you must manage people. What is a manager? A working definition of a manager can be found in The Ultimate Business Dictionary:

"… A person who identifies and achieves organizational objectives through the deployment of appropriate resources. A manager can have responsibilities in one or more of five key areas: managing activities, managing resources, managing information, managing people, and managing him- or herself at the same time as working within the context of the organizational, political and economic business environments… It is the capability to harness resources that largely distinguishes a manager from a non-manager."

But most solos don't manage other people.

Just who is a solo?

The Solo Librarians Division Web site describes a solo as a professional who has no immediate peers within the organization.

One popular traditional management theory is POSDCORB. This theory, first proposed by Luther Gulick and Lyndall Urwick in 1937, identifies the key functions of the chief executive (later expanded to all managers) as Planning, Organizing, Staffing, Directing, Coordinating, Reporting, and Budgeting. This and other theories say that managers do more than manage other people: they control fiscal resources, manage technological change, and affect their physical work environment. Managers market, innovate, accomplish change, make decisions, participate in strategic planning, delegate, communicate, motivate, and lead.

In addition to the managerial skills and functions itemized above, solo librarians perform all the professional and clerical/administrative tasks required for the daily functioning of any library. And that is another factor that contributes to the confusion about a solo's managerial status: Both solos and those to whom solos report often think of these tasks as less than managerial, a misperception that leads to the misplacement of the solo in an organization's hierarchy and the misclassification of the position. The result is obstacles to future organizational advancement and growth.

Traditional hierarchical organizational charts (and even the newer, flatter ones) help define the scope of managerial responsibility. In the wide variety of organizations in which we work (corporations; nonprofits; foundations; federal, state, local, and special govern-

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ment organizations; non-government organizations; universities; professional services/limited liability corporations such as law, accounting, and architecture), the mission of the organization defines the organizational chart; the library is often an add-on. Thus, the organizational chart is not an accurate reflection of the managerial responsibilities of the librarian or information professional.

Let's examine the various functions managers perform and relate them to a library setting.

The first set incorporates the control function, focusing on managing fiscal resources, technological change, and the physical work environment.

Fiscal resources: It might seem simplistic to state, but effective managers work within their budgetary constraints and obtain the most impact for their dollars. In the solo environment, this involves spending all the monies allocated for book and material purchases, electronic resources, and memberships. Spending all the allocated monies makes it possible to justify budgetary increases for subsequent years. The corporate mantra is simple: Use it or lose it. To obtain the most impact for their dollars, solos choose among vendors. They decide which online vendor(s) will best meet the organization's information needs and which subscription agent will be most responsive. Then they negotiate agreements with these vendors that are in their corporate best interest.

Technological change: Managers plan for the orderly replacement of computers, making sure that the library receives new equipment regularly. Staying up-to-date by continually learning about current trends in library technology enables the solo to advocate effectively for additional monies. As both a user and an observer of staff members' needs, the solo often acts as the in-house software and Internet trainer.

Work environment: Many aspects of the physical work environment are not controllable, but many are. Solos cannot control the physical plant, but they do control their immediate area. Solos make sure that their work area is clean, well lighted, safe, and welcoming to visitors. Space is always an issue in any corporate environment, and often the amount of space is allocated, not negotiated. However, the solo's physical space can be optimized and redesigned with shelving, filing cabinets, seating, and lighting.

The second set of functions – innovation, accomplishing change, making decisions, participation in strategic planning, delegation, communication, marketing, motivation, and leadership – can be categorized as a tool kit. It is important for solo librarians to remember that the functions they perform ultimately support the information needs of the organization. Information is the managed product. When an organization is viewed as a dynamic, constantly changing organism, the function of the librarian will change to meet its needs.

It is vital that the solo understand the organization and its near- and long-term informational needs. All the daily activities solos are engaged in market and reinforce their relevance within the organization. As part of the team looking at the organization's future activities (strategic planning), the solo contributes information not readily available to other managers.

Examining Relevance

Today, the need for a special library is always being questioned, and relevance to the organization is crucial. Constant reexamination and reevaluation of the library's purpose is part of the job. What services does the library offer? Who in the organization uses these services? More important, who is not being served? What are their information needs and how can their needs be met? Are these potential customers spending hours surfing the Internet looking for information? What changes can be introduced so clients will become more productive and non-clients will come aboard? The solo should partner with other units and departments, aiming for increased relevance and integration within the organization. Only a manager can effect this sort of change.

The third set of functions focuses on people management skills. This is often a major stumbling block for solos, both in their perception of self-worth and in their career advancement. Whom does a solo manage? All solos manage a professional and are responsible for that employee's continued professional training, performance evaluation, advancement, and retention. If the solo has clerical support, the solo is responsible for the performance of those employees as well.

Is a solo librarian a manager? Yes, because every solo librarian plans, organizes, and delivers a managed product – information – every day.

Suggested Readings

Books

Siess, Judith A. 1997. *The Solo Librarian's Aourcebook. Information Today Inc.*

Siess Judith A. 2003. *The Visible Librarian: Asserting Your Value with Marketing and Advocacy*. American Library Association.

St. Clair, Guy., and Williamson, J. 1992. *Managing the New One-Person Library*. Bowker-Saur.

St. Clair, Guy. 1994. *Power and Influence: Enhancing Information Services Within the Organization*. Bowker-Saur.

St. Clair, Guy. 1996. *Entrepreneurial Librarianship*. Bowker-Saur.

Articles

The body of literature focusing on solo librarianship can be found through the HW Wilson product, Library Literature. During late December 2004, more than 310 articles were found by searching on the phrase "solo librarian," and more than 90 articles were found by searching on "solo librarianship." A cursory review of the titles and sources reveals the scope of geographic coverage (Europe to Australia) and the range of library types, from small publics, to government, to specials.

Let Your Voice Be Heard!!

It's time to vote for your 2005/06 SLA Board of Directors!

Wilda B. Newman
Deputy Chair,
Nominating Committee

SLA's health as an association depends on its members and its leaders. YOU and ME! We must exercise our leadership and vote! An association that is built on information and an informed clientele knows all too well the value of voting and participating in the governance process, both within our own organization and SLA. I speak as a past Director, SLA Board, a current member of the SLA Nominating Committee, and from mentoring members. Associations are lucky to have 35 percent of the membership vote, let's make SLA the exception and make 2005 a record year for voter turnout. As a member since 1972, I have never missed voting in our annual election.

Sylvia Piggott
SLA Past President

Participating in SLA's Spring election of candidates to the Board is a professional responsibility. It is our chance to elect colleagues to office who we believe will play a role in moving the association and our profession forward. Being a passive observer is tantamount to disenfranchising ourselves. The Association is only as good as the officers we elect. So, participate, send in your ballots on time and let 2005 be a record breaking year for returns.

Pam Rollo
SLA President-Elect

I would encourage, if not ask outright, for our membership to make every effort to vote during this year's Board election. We in the Association and the profession have many opportunities and challenges before us. The first way for members to communicate what they want through the Association is to choose leadership who will speak to their ideas and ideals. Let me urge everyone to help break all our previous records and to come out in great numbers this year to vote. I congratulate all of our candidates and thank them for running.

Richard Wallace,
SLA Past Treasurer

I am responsible for the future of SLA. My vote helps insure that SLA will continue to excel and represent me. My vote means I have a voice in the Association - its policies, priorities, services and future direction. I am choosing those members I believe share my ideas and values and will lead the Association. When the ballot arrives I can toss it or spend a few minutes filling it out and sending it in. I am prepared to vote because I have met as many of the candidates as possible during the months before the election, especially at the annual conference. Those I do not meet, I read their statements in *Information Outlook*. Voting in the Association and unit elections means being responsible for and caring about what the Association leaders do.

Membership will receive ballots the first week of February
and they must be returned by Monday, March 14, 2005.

For complete details and information on the candidates visit **www.sla.org/2005election**

When Your Organization Can't Get a KM Project Started

Take It Personally!

By Ken Nordan

You've read article after article about knowledge management. Maybe you've joined SLA's Knowledge Management Section. Maybe you've taken a course or two or received a degree or certificate in knowledge management. And now you want to get started with a KM project at work, but you get that vacant look that tells you no one is ready to follow. So, what do you do?

Part of the problem is perception. What is knowledge management? Ask 10 people to define knowledge management and you will get 10 different answers. There are many different camps, theories, and practices all called knowledge management. Software manufactures tell you, "Purchase our software and your KM project will hit the ground running." Consultants want you to hire them to develop focus groups, teams, and best practices and spend time and money to implement their solution. Meanwhile, your organization is looking at the bottom line and asking, "What is the return on investment for these kinds of projects?" (See sidebar, "Key Points in Knowledge Management.")

Another part of the problem is leadership. Projects that require changing the way an organization thinks, performs, and measures its success require leadership. This kind of leadership is not for the faint of heart. Leading at your

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organization's "bleeding edge" can be very scary. Leaders are, by definition, people others are willing to follow. A good leader gives followers something to believe in, something that has a good probability of working and of ultimately making (or saving) the organization money (or whatever the organization deems its measure of success).

But... How?

You're still asking "What should I do to start a knowledge management program at my organization when no one will follow?"

First, you have to deal with your concept of KM and how it will fit into your organization. Don't worry about the other nine people in the room; find your own understanding. Because there are so many definitions, each one is somewhat right and each one is somewhat wrong. Right because KM has varied definitions and wrong because many of the definitions will not work in your organization. To build a proposal, you must work from a position that applies your knowledge of KM to meeting the needs of your organization.

Second, think small. No organization is eager to undertake a major change in how it works, does business, and measures success. I learned the hard way in my model train hobby that large projects never get completed. I worked five years on a train layout in my basement that never once ran trains. I literally "lost steam" in making the layout, because the trains lay idle while I worked for years laying track and infrastructure. I never executed the mission of the layout: run trains. A small project that solves an important problem works wonders to get people on board the KM Silver Streak.

Key Points in Knowledge Management

For those of you who have not read about KM, have not attended meetings and symposiums on KM, and have not participated in blogs or discussion lists on the topic, here are some key points. Remember, though, that academic definitions are not always as practical as real-life definitions. This is, as a first take, part of the definition of knowledge management and why it is knowledge — above intelligence, information, or education — that an organization seeks when it tries to decide what to do next.

Knowledge is wholly and completely a human function. Knowledge is not mechanical or developed in computers. Computers are tools that can help a person with knowledge create more knowledge. Because organizations employ people, knowledge management is, in one sense, people management: the management of the knowledgeable people in the organization (and those associated with the organization) for the success of the organization.

When we talk specifically about people and the management of their knowledge, we also must talk about the relationships these people have with one another. Knowledge management is also the study, building, and use of knowledge networks. A network of free-thinking, knowledgeable people will create more new knowledge than these same knowledgeable people would without a network.

Members of the technology side of the equation will remind us that the organization itself has knowledge, not in the humanist sense of the word, but in the sense that deep within the mind that is your computer system is information (data) that can be used to advance the organization. Correctly or not, this information is defined as knowledge. Many software companies use this definition of knowledge to further their own definition of KM. However, without knowledgeable people tracking down this information and other knowledgeable people analyzing and interpreting the findings, little improvement will be made.

Knowledge management asks that the organization's systems of accounting be replaced by new accounting practices that value more than tangible assets — such as buildings, machines, and client renewals. Accounting practices must also assign value to the knowledge assets found in employees, clients, and partners. Assigning value and understanding how to use these assets are important to the bigger picture that is KM; however, it is not the way to manage knowledge.

Third, if you're new to the organization and not specifically assigned to develop a KM scheme, wait! As you work in the organization, you will learn more about it, which will help you define KM for this organization. Learning what problems can be solved will help you get KM moving. Waiting and learning about your organization will help you understand what rewards truly make a difference for your team members. Even when your only job is to create a scheme, learning, talking, and building networks within the organization are important KM strategies that can be accomplished by strategic waiting.

Gaining credibility is also important in bringing people on board. KM has gotten a reputation (in some cases, deservedly) for aiding in the reduction of head count. One of the many activities in the KM process is a step in which people are asked (or required) to give up knowledge that they have acquired over many years. We have all heard stories of people who have lost their jobs after teaching someone else their tricks. It is important to show people (both management and line workers) that KM is not about reduction but about building, creating, and learning new ways for everyone to be successful.

Fourth, start with yourself. If others will not follow now, lead anyway, and they may follow later. Sometimes the best project ideas start with problems that you need to solve. Find a problem and create a solution using KM principles. The problem you are having may be universal to your organization, and the solution could provide valuable insight about KM to others around you. The remainder of this article contains ideas from my own experiences that could help you create KM projects for yourself or help you to think about how KM can fit into your day.

Applications of KM

KM cannot be defined accurately without including activities in relationship-building. Networking for an organization includes internal and external connections. The same is true for individuals. If your organization has not already developed relationships with people and organizations both inside and outside its walls, begin developing these relationships for yourself. This is the first step in taking KM personally when your organization has not. Membership in professional organizations can start you in the right direction, but having a list of names is not the same as networking, nor is it KM. Learning how you can help others, as well as how you can benefit from them, is part of KM.

The large software company I worked for in the mid-1990s allowed only one member of a division to go to a conference. This policy made the "have-not" team members feel left out and unimportant. Many viewed the opportunity to go to these conferences as a reward. I pushed for the requirement in my division that people who attended conferences must lead discussions on the topics they learned about during a divisional brown-bag lunch. This encouraged the spread of knowledge within the division and helped build teams. As members of the team participated in the discussion, they learned about one another's strengths and interests. Managers can also encourage in-service brown-bags among groups to help employees build their own networks and learn about other topics.

Building networks of knowledgeable people is important, and building networks of information is equally important. At one point, my database design career of 12 years took a major step in a new direction when I was transferred to a different division of my company. The change required me to purge my brain of much of what I knew and learn hundreds of new things. At the same time, IBM was moving to a paperless documentation delivery system. Most of the documentation was now on the Internet or on CD-ROM. A lot of new information was thrust into my hands and head.

I was having trouble keeping track of all the links to the documentation; worse, I kept forgetting what each manual covered. By the time I typed in the URL and got the document loaded, I was never quite sure if I was at the right place.

It was 1995 and I had recently read a book about HTML, so I decided to create a "home page" on my computer that contained a list of the best links. To remind me of the content, I wrote short abstracts describing the content of each site. Within a month, the page contained several categories and more than a hundred links to sites with various pieces of information. At some point, my boss found out about my page and asked to see it. Before too long he had built a page of his own and placed it on the server. Soon the page became a makeshift portal that the entire department used to post and find items of interest.

A point to remember: None of this was done as a formal project and it was not served as a "real" Web or intranet site. It was just an HTML document that was executed as a file in a Web browser – something anyone with a basic knowledge of HTML could create in a few minutes.

Data Models

Data can be represented in many ways. Each representation is considered a "Data Model." Overall, these data models can be divided into two larger groups: data models that support a single parent and other data models that support multiple parents. The number of parental relationships are important when categorizing data into multiple categories. For this discussion I'll identify four different data models although experts have defined many more.

Hierarchical Model: **The hierarchical data model organizes data in a tree structure. There is a hierarchy of parent and child data records. This structure permits a record to have repeating information, generally in the child data record, and is considered a one-to-many relationship.**

Network Model: **Some data is more naturally modeled with more than one parent per child. The network model permits the modeling of many-to-many relationships in data. The basic modeling construct is based on sets where there is an owner of the set (parent) and members of the set (children). A child can participate in multiple sets; therefore, there is the possibility of having multiple parents.**

Relational Model: **In a relational model, data are organized into tables and this data are also used to define the relationships between the tables. Data relationships can also be defined at data retrieval time and therefore a record instance (row) can participate in multiple relationships to other records. This is somewhat analogous to multiple parents, but more powerful.**

Object Model: **A major benefit of the object model is the unification of the application with the data in the database. Object databases contrast with relational databases in that a relational database must flatten out the data to fit into the tables, where an object database manages the data by containing the data in groups (objects) that contain all data relationships. This data model allows the data to have multiple relationships to other data much like the relational model.**

Indexing a PC

In a class I took last year, we discussed pathfinders and Web sites dedicated to cataloging useful Web sites. As a project, one of the students built a Web page backed by a database that provided information and URLs. The topic intrigued me, so I built a Microsoft Access application that I could run from my home PC. One of the problems I have with Web browsers is the use of "Favorites." Like file systems (now called folders) in MS Windows, Web browser Favorites use hierarchical schemes. Items cataloged hierarchically can appear easily in only one folder; therefore, they can have only one category. This works fine when dealing with simple taxonomies, but not everything is so simple.

To "fix" the problem I have with the Favorites scheme and MS Windows file support, I developed a database application. This application allowed a Web page (I call it a resource) to be associated with multiple topics. When I catalog a new resource, it can be found next to all other resources that have similar topic headings. I also defined "resource" to mean all items I could find on my home PC, including MS Word documents, PDF documents, sound recordings, pictures, e-mail addresses, and most any other MS Windows application. I can also include a short abstract for each resource to remind me why I've included it in my database and can assign other important attributes such as reliability, language, and date added.

My KM application is a tool I can use to find information faster and turn that information into knowledge. As an amateur genealogist specializing in Norwegian genealogy, I use the application to organize my contacts, bibliographic information, maps, photos, and the various pieces of a book I will eventually write about my Norwegian family heritage. Because this is a database, I can arrange the data in various ways to support my needs more easily than if they were written on paper. (See sidebar, "Data Models.")

At the library where I work, I've created an MS Access and MS Excel application that generates statistics out of the raw data provided by the computer lab sign-on software package. The generated reports support our need to keep track of monthly computer use by patrons. The new statistics have gone a long way toward identifying when additional staff, new computers, and computer maintenance are required. These software tools organize information so that library team members can know more (create knowledge) about our current uses and project future needs of our library. I created these reports not because it was part of my job, but because I saw a need and developed a solution. The solution was similar to a data-mining project, but it used tools that were close at hand and cost-effective.

Sharing experiences and empowering others are powerful aspects of knowledge management that are very often overlooked. In my studies to learn Norwegian, I suggested that an organization of language teachers help students write short stories in their new language. These short stories would help the learners use the language in context. Instead of using a book written by teachers for students, I suggested a book for students by students. The stories would be edited by other students, encouraging like-minded people to form groups and forge an important learning bond. These motivated students had the opportunity to create their own learning environment and, at the same time, create a product that can be used to educate others. This method also can be used when an organization needs to update material and documentation for its processes. Operations manuals, help-desk guides, and best practices are examples of documents that can be created by groups of knowledgeable people within the organization.

A Holistic Approach to KM

Various groups have begun to discuss a "new" view of knowledge management, called the holistic approach. Many disciplines have moved to a holistic approach. Various medical, environmental, and political organizations now purport to do things in a more holistic way. They approach a problem, policy, person, or other entity not as a single item that has no connection to or dependence on outside entities but as part of a system or group of other directly or indirectly related entities.

The holistic approach is ancient. The ancient approach became lost over time, and these disciplines are now finding their roots. This can be said of knowledge management, too. However, many practitioners and teachers of KM use the holistic approach to underscore other aspects of KM not always associated with "textbook" knowledge management definitions.

A holistic approach to knowledge management considers the organization and, more important, all entities that are related to the organization. It establishes an organizational culture, value, and reward system that facilitates the application of intellectual capital for the good of the organization and those who are associated with it.

Holistic knowledge management combines all organizational forms of knowledge. These "knowledge assets" are human knowledge (that of the organization's personnel); structural knowledge (patents, methods, and data); and market knowledge (that of clients, partners, and competitors). Many believe that organizations — be they departments, companies, industries, or nations — that look at issues with a holistic view have a better chance of finding solutions and succeeding.

Knowledge Mapping

Knowledge mapping is an important function to learn who in your knowledge network knows what and to identify the existence of gaps in that network. Mapping is an effective process by itself, and it becomes more important when you use a tool to maintain the information about your network. The tool can take various forms: a flow chart, a graph, a list of names, a database of relationships, or a commercial product just for this purpose. Using a specific tool is less important than understanding that formalizing the process into an updateable and reusable end product has the greatest value to you and the organization.

Knowledge mapping can help your organization facilitate relationships within and outside the organization. The idea of "six degrees of separation" is knowledge mapping at a social level. According to this theory, every person is only six people away from every other person on the planet, if we just knew the paths to take. Knowledge and solutions can also be just a few people away. When someone in your organization finds a resource for a piece of knowledge, capture that resource's location or name to a database (electronic or paper). Later, when a similar or related question is asked, you will have a starting point to begin your research.

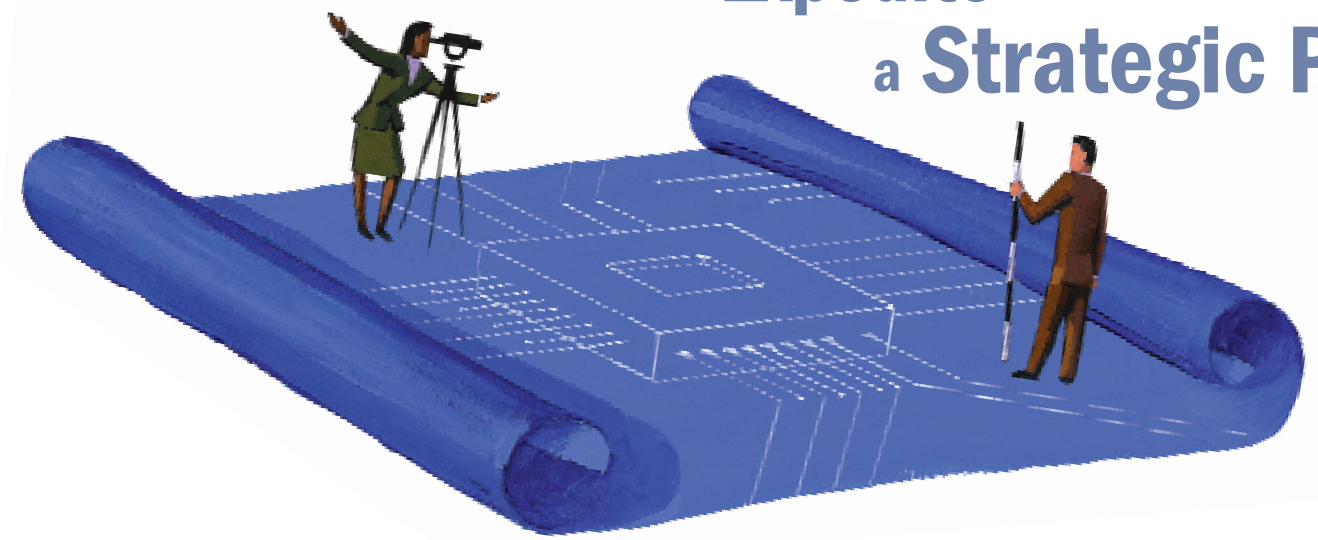
Knowledge management as a discipline is fairly new to our vocabulary, but many of its practices are not new. Managers use a KM term when they announce in job advertisements that they want "team players." A team player is someone who is willing to teach, learn, mentor, and act for the greater good of the organization and the other members of the team. The best managers put the term into action by encouraging a team atmosphere. They create this atmosphere by building communication networks and developing reciprocal values (rewards) for good team players.

Communication networks include mentoring relationships, as well as sharing and other organizational learning opportunities. This type of manager also understands which specific reciprocal values will reward each team member. This form of knowledge management, sometimes called a holistic approach, is significantly different from other forms of management. (See sidebar, "A Holistic Approach to KM.")

Organizations should reward and retain team members who benefit the organization by sharing knowledge, rather than those who have little or no intent to share. These organizations may have a better chance for long-term survival among the knowledge-based businesses of the future. Because you may not be able to change the culture of your entire organization, start locally. Encouraging sharing in your department will make your department more effective and could ultimately increase its worth in the eyes of the organization. Other managers may try to emulate your success, and KM will have more converts.

Knowledge management is not simple; if it were, everyone would have adopted the practice years ago. Identifying the low-hanging fruit (simple problems that KM can solve), building small success stories today, and making the immediate world around you better with KM will take time. These KM victories will highlight to the larger organization what KM really is, that it can be successful, and that ultimately it can improve the organization.

Create, Organize and Expedite a Strategic Plan



How to Use the Balanced Scorecard and the Stage-Gate Funnel

By Laura Claggett and Barbara Eklund

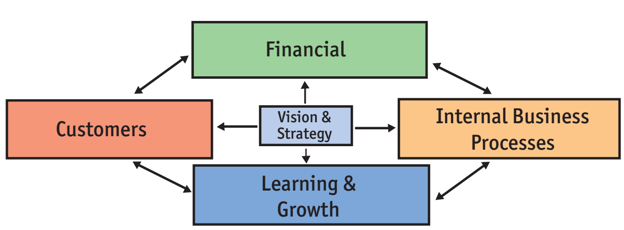
Special librarians sometimes have a make-it-up-as-we-go-along attitude, but we also like to know where we are going and what we need to do to get there. We motivate ourselves by setting goals, working vigorously to meet them, and looking back at the end of the year to see our many accomplishments. We like to see ideas become realities, to see positive changes happen around us, and to see our libraries and our team members grow and develop day by day.

For these reasons, it is important to have pertinent management tools to help us create, organize and expedite our strategic plans – to make sure we get where we want to be and where our customers need us to be. Planning increases the chance that we will achieve our vision and goals. It will help us focus our boundless energies and help us identify not only what we need to do, but what not to do. Especially if faced with shrinking budgets, staff cuts, and/or economic uncertainty, it's just not realistic to do everything for everybody all the time. To prevent spreading our resources too thin, and to still accomplish our goals, we definitely need to create or rethink a strategic plan.

Our criteria for a good plan are:

- It must be flexible, not written in stone – as our environments change, we need to change with them.
- Everyone is involved in its creation.
- It's not just a once-a-year exercise, or a piece of paper that's created and never looked at again.
- It's actionable and relevant to the library's and company's vision/mission.
- It's geared toward the customers.

Figure 1



Copied with permission from the Balanced Scorecard Institute: "A Balancing Act" by Howard Rohm.

Two useful tools to organize and expedite the strategic planning process are the balanced scorecard and the stage-gate funnel.

The Balanced Scorecard

The balanced scorecard is an incredibly useful strategic planning tool developed by Dr. Robert Kaplan and David Norton of the Harvard Business School in the early 1990s. Howard Rohm of the Balanced Scorecard Institute (www.balancedscorecard.org) describes it as a performance management system that can be used by any size organization to:

- Align the vision and mission with customer requirements and day-to-day work.
- Manage and evaluate business strategies.
- Monitor operation efficiency improvements.
- Build organization capacity.
- Communicate progress to all employees.

Supporting the vision and mission of an organization is at the heart and soul of strategic planning. Breaking down a plan into small, manageable portions, shows more clearly if the projects directly correlate with the company's overall vision and mission.

The balanced scorecard shows a strategy from four different, but interconnected perspectives (figure 1).

- Financial: How do we/should we measure and evaluate our financial performance? Do our metrics send the right message (i.e. speak the language) of our stakeholders?
- Internal business processes: At what business processes must we excel?

• Customers: How do we/should we appear to our customers?
• Learning and growth: How will we sustain our ability to change and improve?

Note: All perspectives lead to the financial perspective.

Each of the four quadrants is broken down further into objectives. Under the objectives are initiatives (projects) and then metrics. In other words, it is: what you are trying to accomplish, how you plan to do it, and how you will measure success. Figure 2 is a brief example of one objective, with initiatives and metrics, for an internal business process with the strategy of expanding online content.

Figure 2:

Internal Business Process - To Expand Online Content

Objective #1:
- **Evaluate full-text online book vendors**

Initiatives:
- **Review the literature on full-text online book vendors**
- **Look at vendor products at conferences, talk to colleagues about their use of full-text online book vendors, invite vendors to library**
- **Evaluate cost, content holdings, accessibility, and other pertinent criteria for each vendor**
- **Run a 30-day pilot for customers on one or two products that are deemed the best to serve their needs**

Metrics:
- **After the pilot, send a follow-up to customers to rate the product(s) and/or get their opinions on the use and usefulness of the product**
- **Evaluate products' usage statistics**

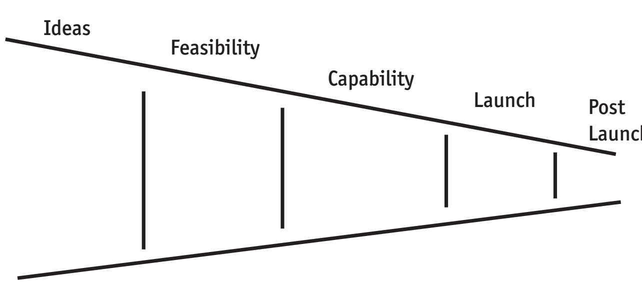
Ultimately, the scorecard process breaks the strategic plan into manageable pieces while at the same time providing measures to communicate the library's evidence-based management to upper management. Showing that the library's objectives and accompanying projects are in line with the library's strategic plan, which supports the company-wide strategy, legitimizes the presence of the library within the organization. In other words, the balanced scorecard helps organize and run the library according to a specific strategic plan, while demonstrating the library's value to the company as a whole.

Most library managers create strategic plans specific to their library. They do not rely solely on their company's strategic plan, so the manager can create a scorecard that will help manage the library's unique plan. In the article "Determining and Communicating the Value of the Special Library" (Information Outlook, March 2003), Joseph Matthews mentions that the scorecard approach for the special library is based on answering four questions:

• How do our stakeholders see us? (financial perspective)
• At what must we excel? (internal business processes perspective)
• How do customers (and non-users) see the library? (customers' perspective)
• How can the library continue to improve and create value? (learning and growth perspective)

Matthews puts a great deal of emphasis on the "measures" aspect of the balanced scorecard. He suggests formulating targets (objectives) in each of the four areas and designing three to five measures for each. Some sample measures include:

Figure 3
Project Funnel



• Customer satisfaction survey (customers).
• The time and cost of processing new materials or cost and quality of document delivery (internal business processes).
• Introduction of a new service, and training staff on its application (learning and growth).
• Demonstrate effective use of funding with cost-benefit data (financial).

However, it is important to point out that the design of the balanced scorecard is not set in stone. A number of variations can be made to create the ideal scorecard for a library. For instance, the balanced scorecard for the non-profit library may differ from the for profit scorecard in that the customer perspective might outweigh the financial perspective. As Roswitha Poll notes in her article "Performance, Process and Costs: Managing Service Quality with the Balanced Scorecard," (Library Trends, Spring 2001), "libraries do not strive for maximum gain but for best service."

So, instead of having the financial perspective at the top of the scorecard, the customer perspective may be at the pinnacle. Additional perspectives to the balanced scorecard can even be added. For instance, Matthews suggests including an Information Resources perspective to the non-profit scorecard, showing just how versatile a tool the balanced scorecard can be for special libraries.

The Stage-Gate Method

The stage-gate funnel is an easy and functional tool to plot and follow the progress of projects from a strategic plan (figure 3). The Stage-Gate Process, trademarked by the Product Development Institute (www.prod-dev.com), has been used for many years by R&D and marketing departments for new product development efforts. We have modified the Stage-Gate Process to track major projects, not everyday accountabilities, and review each project according to our predetermined criteria.

We use a stage-gate funnel in the UOP library for a variety of reasons. It is a good visual tool – it validates staff ideas: projects by showing them on the funnel, and it motivates us as we see progress and action as projects move from the ideas stage to launch. It empowers us as we share in go/no-go decisions and it brings spontaneity into the planning process.

It builds credibility with management by: using a common business model and using a good communication tool that visually shows regular progress as each project marches through the funnel (or is cut for legitimate reasons because it did not meet all of the criteria). It also demonstrates to management our ability to make tough business decisions by weighing the value of each project. Since there are set criteria that every project must meet, using the stage-gate tool also helps everyone understand the reasons for no-go decisions.

Since we consistently evaluate, add, and update new products and services, meet customer demand, and attract new customers, it is critical that we have a method to keep up with our multifaceted projects.

We start our funnel with a group meeting. We talk about our environment – the economic times that are impacting our company and in turn the library. We talk about what the company is doing and how it is changing, what our customers are doing and asking for, how technology is impacting information access for both our customers and ourselves, and what's new with our vendors and in their pipeline that will affect us. Based on all of this lively conversation, we talk about what we'd like to be doing, and what we need to be doing to stay vital to our company. As we talk, we identify new project ideas and place them accordingly on the funnel. We also assign a project leader to each project.

Once a project is placed on the funnel, in order for it to move from one gate to the next, brainstorm as a group the following criteria questions. If the answer to all questions in a stage is yes, the project is ready to move to the next stage (figure 4).

A new project doesn't necessarily have to start at the ideas stage. When we decided to license access to a full-text online book database, the project met all the criteria to be placed in the Capability stage when it was first entered on the funnel. For the tool to be most effective, update the funnel regularly – monthly, quarterly, etc – depending on the amount of project activity.

The stage-gate funnel process and the balanced scorecard can be used together to create and implement a successful strategic plan for a special library. Since the funnel is a project/ product development tool it fits in quite nicely with the scorecard's objective/initiative layout. Once an objective, like improving customer service, has been determined for the library's scorecard then the library staff can brainstorm possible projects/initiatives that will help achieve this goal. After brainstorming, the library staff can use the stage-gate method to determine which ideas are best and most feasible, and eliminate the others. Some projects might move fairly quickly through the funnel.

However, more complex projects will make better use of what the stage-gate method has to offer. For example, attempting to automate a collection is a huge undertaking and the stage-gate method can help organize the process and provide inspection points where progress is checked. After using the stage-gate method to determine the most suitable projects to achieve the objectives laid out in your balanced scorecard, you can then determine the measures you would like to invoke to determine the success of your projects, objectives and ultimately, your library's strategic plan.

Overall, the scorecard and the funnel compliment each other very nicely. The funnel process is an ideal project management tool, a key aspect of the balanced scorecard, and the balanced scorecard is an all-encompassing strategic management device. Used together, these two tools can help solve a library's strategic planning puzzle.

Figure 4

Project Funnel Criteria

To move from ideas to feasibility

- **Does the idea have merit for our customers?**
- **Is it relevant to our vision/mission?**
- **Do we have a good grasp of how we'll do it?**
- **Do we have resources to further explore – adequate staff as well as funds?**

To move from feasibility to capability

- **Have we demonstrated that the project is worthwhile?**
- **Can we justify the allocation of resources?**
- **Can we do it?**

To move from capability to launch

- **Are all elements of the project complete?**
- **Did we get it right?**
- **Is it ready to launch?**

Post Launch – before moving off of the funnel

- **Review business performance – Did everything go as planned; What could have been done better?**
- **Make corrections if needed**
- **Interpret customer feedback**
- **Assess key learning & findings**

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From Print to E-Mail: Creating a Database-Generated HTML Newsletter

By Paul Yachnes

Sometimes trying to make a small change in the culture of your institution can be much more difficult than tackling a tricky technical problem or overcoming resource limitations.

So I discovered when I proposed converting, from print to electronic format, News Briefs, a daily print digest of newspaper industry news compiled from newspapers, Web sites, and magazines, and distributed to selected staff (figures 1 and 2). When I became manager at the Newspaper Association of America's (NAA) Information Resource Center (IRC) more than four years ago, my proposals to convert the digest to a nicely formatted electronic newsletter met with stiff resistance.

The head of the Communications Department, to which the IRC belongs, stuck with the dogma "senior staff wants it the way it is." Likewise, the part-time staffer who put it together each day was content to cut and paste articles from various newspapers and magazines, print articles from Web sites, and then compile, photocopy, and distribute the digest to selected staff members. This process took at least three of her available five hours each day. The attitude seemed to be, "Why would we want to do it electronically, and wouldn't it be more work?"

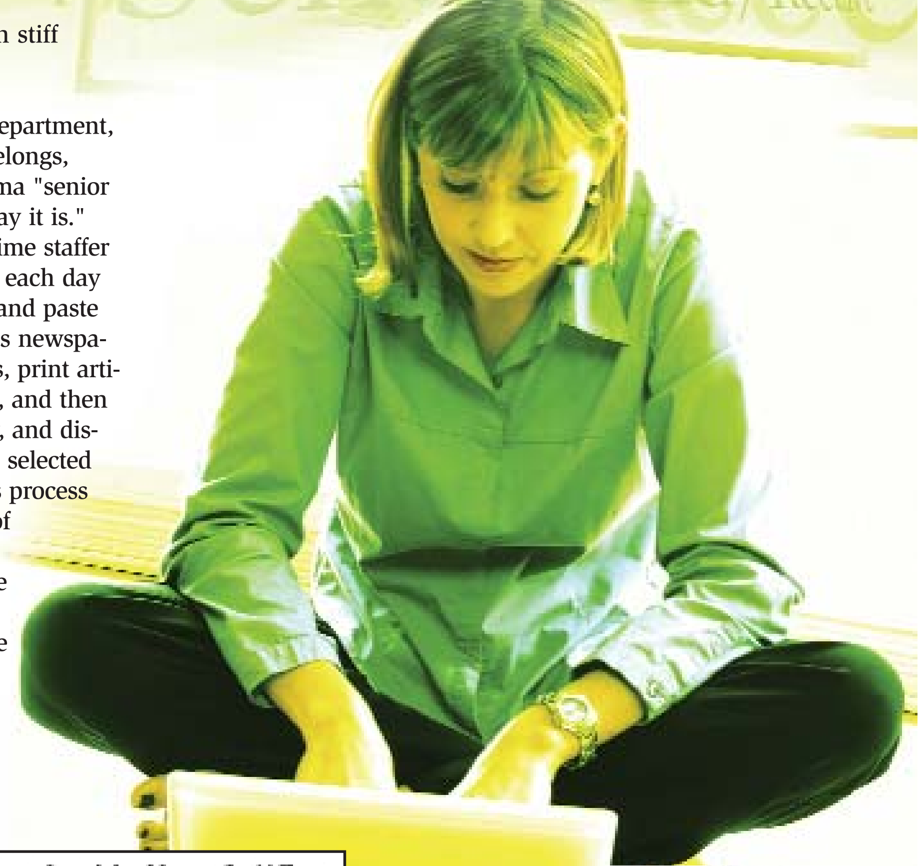


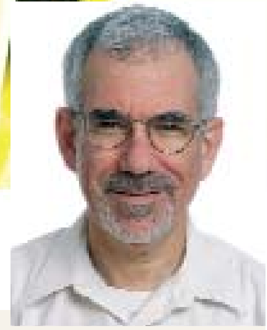
Figure 1


News BRIEFS

Figure 2


After Circulation Scandal, a Move to Build Trust

Pumping Up Their Numbers



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With changes in Communications Department management in late 2003 and early 2004, the opportunity arose to do things in new ways. Staff cuts in the IRC made it imperative to find a more time-efficient way to compile and distribute News Briefs. This time, when I proposed converting the digest to an electronic format, my idea was greeted with enthusiasm from IRC staff and senior management. They decided that the newsletter should take the form of an e-mail, containing as many full-text articles as possible and short summaries with links to articles for which (owing to copyright considerations) full text could not be reproduced. The digest was to be renamed NAA News. By eliminating photocopy expense and the time spent on distribution, we could make the newsletter available to all staff.

Planning and Design

Three main areas needed consideration: (1) copyright permissions for electronic distribution, (2) the design and usability of the newsletter, and (3) the technical requirements of efficient compilation and distribution.

1. At the time this project was initiated, the Copyright Clearance Center (CCC) photocopy license did not include an electronic distribution license (they've now been rolled into one), so we had to obtain one. We decided to attempt to get blanket permission directly from certain core publications not covered by CCC's electronic distribution license. For the rest, we would just include a brief article summary with a link.

2. I came up with a list of features I wanted the newsletter to contain: (a) a distinct and original nameplate; (b) a table of contents, including article headlines, bylines, sources, and publication dates; with internal hotlinks to (c) the full article, including a repetition of the information in "b" followed by the article body, or a summary and the URL; (d) hotlinks from the top of each article back to its listing in the table of contents; and (e) hotlinks from the bottom of each article to the top of the e-newsletter. Implementation of these features dictated that the e-mail be formatted as HTML, which as not a problem as it was for internal distribution only, and all staff used Outlook as their e-mail browser.

3. Since the daily newsletter was to be compiled by support staff with limited technical skills, I needed to make the process as simple as possible, with completely automated formatting. It was clear that it would have to be database-generated. Our library database software, Inmagic DB/Textworks, with its sophisticated report-writing capabilities, including its ability to incorporate HTML code, seemed fully up to the task.

All I needed to do was create a simple database and record input form into which support staff could copy and paste headlines, bylines, sources, dates, comments, articles, and links from a variety of online sources, and then create a report form to generate the HTML code. All support staff had to do daily was create and save records, run the report, and save it as HTML. The saved HTML file would then be inserted into a blank Outlook e-mail message and sent to a global address list.

Figure 3

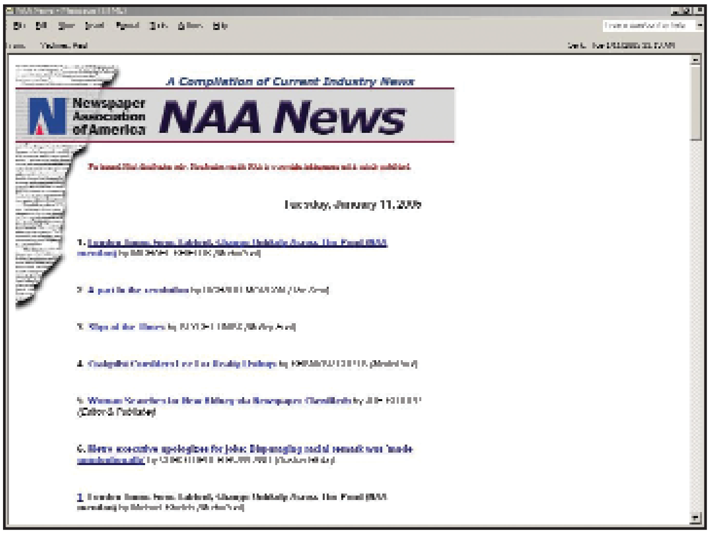
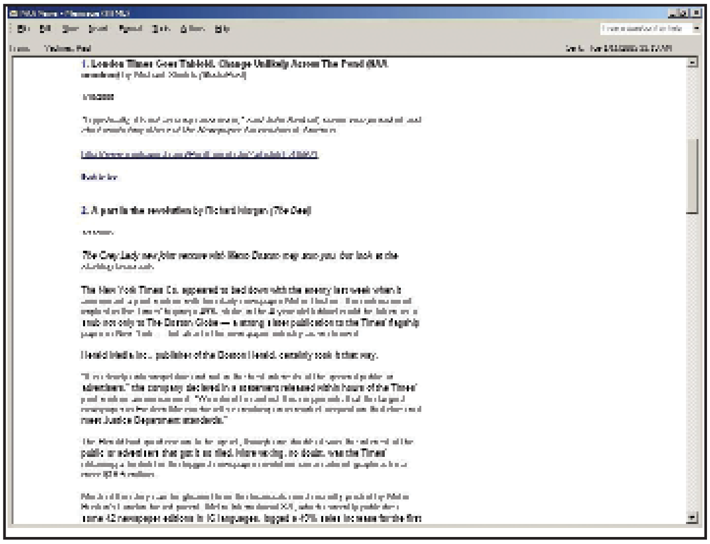


Figure 4



Implementation, Phase I

Creating the database was easy and took little time; creating the report form was more challenging. It took several days of experimentation to get the result I wanted (figures 3 and 4).

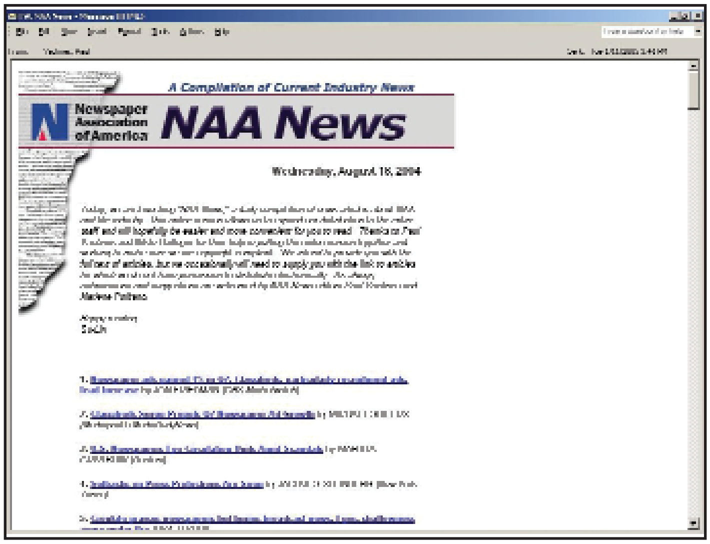
A particularly knotty problem was that I could not initially get the desired format: a table of contents above linking to the complete articles below. The report would cycle through the set of article records only once, creating the table of contents. I could find no way to get it to cycle through a second time to insert the articles in order below the table of contents.

Once the report had arrived at the last record, there was no way to go to the beginning to pull out the full articles. After a few calls to Inmagic support, I determined that this was, in fact, impossible. The only solution was to redesign the database to incorporate all the articles for each issue in a single record. Since there would be a maximum of 10 articles per issue, this proved to be not too unwieldy and, most important, it worked.

Our Web developer came up with a good design for the nameplate. It was placed at a Web address for me to download, and I found that I could insert it into the newsletter by referencing the URL where the graphics file was located in the HTML code of my report. Outlook would then pull it from the Web and insert it into the e-mail.

I added a feature that took advantage of the DB/Textworks report designer's "prompted text" feature, which prompts for text and inserts it in the report, allowing for addition of text not contained in the database. I used this feature to allow for the insertion of a note, when needed, at the top of the newsletter. In fact, it was used in the very first issue to include a note from the senior vice president of communications, to introduce and launch the newsletter (figure 5).

Figure 5



I wrote up step-by-step instructions for staff to follow, and, after a brief training, we were ready to go.

Implementation, Phase II

After we launched the newsletter, I added a number of small tweaks. We included a copyright notice at the top of the newsletter to ensure our staff's awareness that the contents contain copyrighted material and that forwarding the newsletter outside the association is forbidden. We made a couple of font changes. We also decided to include the URLs for all articles, not just those we couldn't include in full. This was an important decision: Because our staff is forbidden to forward the newsletter outside NAA, it was essential to include the URL so they could at least refer people to the original source, if they needed to.

There remained only the original database design problem: The articles were in groups of five to 10 per record, and not in separate records. This severely limited the subsequent usefulness of the database for searching articles, but fixing it introduced an additional, time-consuming step in the compilation of the newsletter. Instead of being pasted directly into the database, articles had to be pasted into a separate document first, ordered according to our list of priorities, and then pasted into the record in order. Separate records would allow for an ordinal number field and the use of an automatic sort by that field in the final report.

This possibility remained in the back of my mind for several months until I finally had time to work on the problem. My idea was to break the newsletter into two separate reports, to be run, saved as HTML, and inserted in Outlook e-mail in two steps. This proved to be less work than anticipated; most of the code from the original report could be recycled. I created one report to contain the nameplate, header information, table of contents, and footer information, and a second to contain the articles themselves.

After outputting both reports as HTML, I could insert the first in Outlook e-mail and then insert the second in the same e-mail immediately before the footer. The result was identical to the original newsletter in every respect. The database of articles can now be integrated into a digital library I will be creating in the coming year. After writing up the modified instructions for creating the newsletter, I considered the project completed – at least for the time being, since there are always improvements to be made.

Lessons Learned

Soon after the first issue of NAA News came out, the feedback came pouring in, and it was 100 percent positive. Responses included "Thank you all – this is great!"; "NAA News looks really good. Nice job"; "This is SO much better!"; "This is an excellent service that will be interesting and useful for all NAA employees"; and "Well done - clean, simple & straightforward." The newsletter got people's attention and – even more gratifying – we could see that it was something they wanted and appreciated.

I think this project may also have had an impact on the perspective of management, opening their eyes to a different way of doing things. A few months later, the head of the Communications Department informed me that, beginning in 2005, management had decided that the IRC should move in the direction of the paperless, digital library. I believe that our small but high-profile project influenced this decision. It was a concrete lesson on the power of what Tom Peters, in his book *The Project 50*, calls the "Small WOW Project." He says, "To get going on a B-I-G issue (like culture change), you do not need a big project."

On the technical level, the project was largely a lesson in using databases to assemble HTML on the fly to create online resources for providing current awareness. Using an off-the-shelf application like Inmagic DB/Textworks, with its powerful report-writing capabilities, made it relatively easy, but the same kind of thing can be done by those with more advanced computer skills using open source software such as MySQL and PHP. This is an interesting area for future exploration and experimentation.

Virtual Learning Series

March Topic:
Identifying Client Needs

Part I
The Process
March 9, 2005
12:00 pm – 1:30 pm ET

Part II
Using the Findings to Shape Information Provision
March 23, 2005
12:00 pm – 1:30 pm ET

Speaker:
Sue Henczel
INFASE Solutions

April Topic:
Negotiating

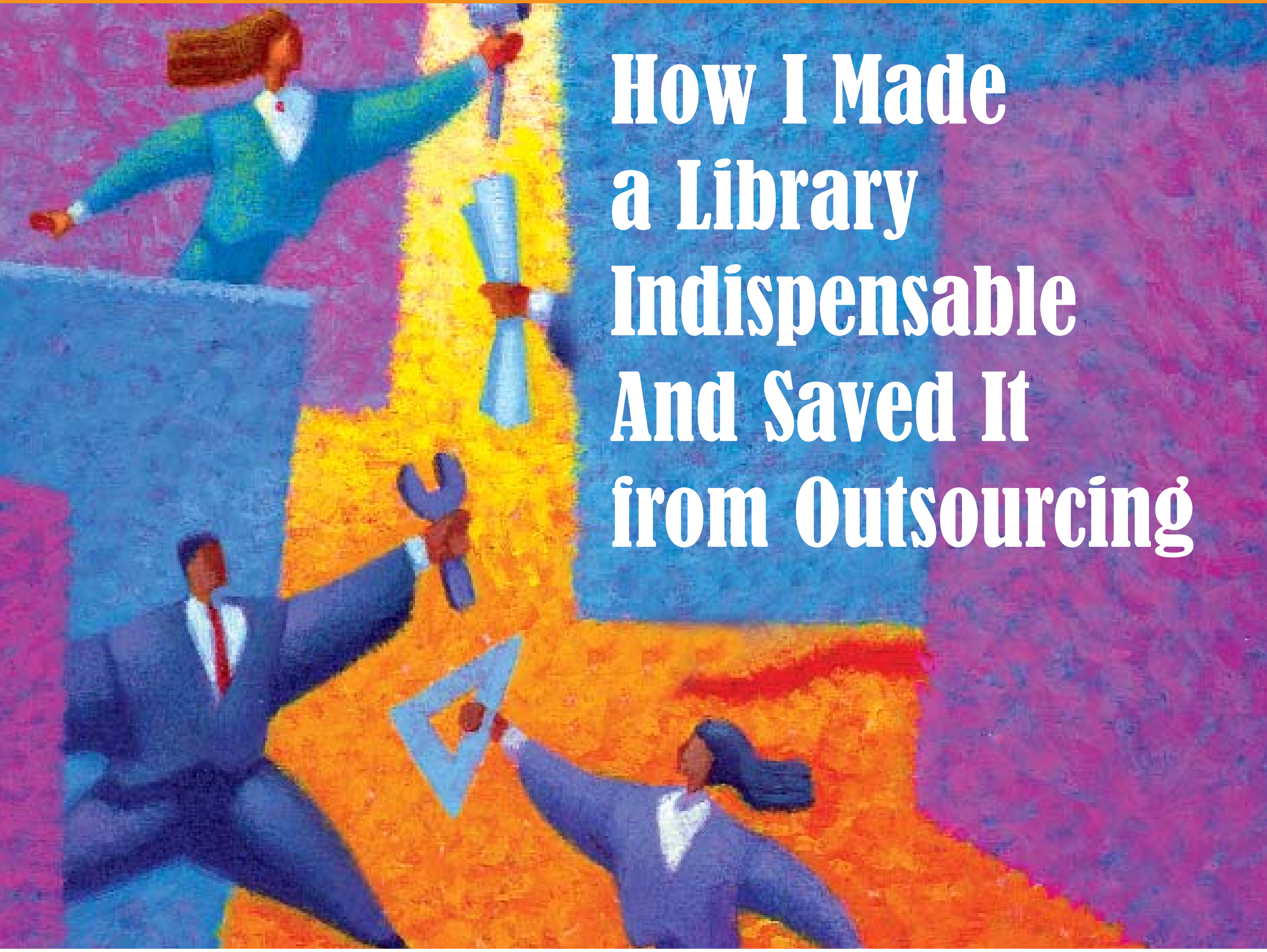
Part I
The Art of Negotiating Anything
April 6, 2005
2:00 pm -3:30 pm ET

Part II
The Art of Negotiating Anything
April 13, 2005
2:00 pm -3:30 pm ET

Speaker:
Jennifer R. Pitarresi, Esq.
Founder, JP Consulting

SLA
Connecting People and Information

www.sla.org/virtualseminar



How I Made a Library Indispensable And Saved It from Outsourcing

By Penny S. Sympson

When I interviewed for a job at an engineering firm, the management was seeking a librarian to maintain its collection, although it was also considering outsourcing library services. The possibility of unemployment frightened me, but the challenge was irresistible. I vowed to myself that if I got the job, I would make the library indispensable. After all, I hadn't switched careers and pursued the MLIS degree for nothing.

In December 2001, I got the job and began my corporate librarian career at Wiss, Janney, Elstner Associates, Inc. (WJE). WJE is a 50-year-old firm of structural engineers, architects, and materials scientists headquartered in Northbrook, Illinois. The firm specializes in failure analysis and forensic engineering, and has 18 branches nationwide.

As the solo librarian, I reported to the executive vice president and served the entire staff of 225 professionals and 125 support personnel. The branch units had small collections of materials, but the main library was in Northbrook. The main collection consisted of approximately 7,000 books and long runs of core journal titles. An online catalog was available to the librarian but not yet to the staff.

At the beginning, I received very few requests and could understand why outsourcing was under consideration. I used this downtime to learn the job, learn the collection, and understand exactly what WJE did.

I began rearranging the library to improve continuity and enhance efficiency in locating items. Integrating a smaller, separate collection into the main collection meant that I touched a lot of books, but it also meant that I saw the titles the library contained. It became clear to me that older editions were as important as current editions. Reorganizing the journals and books to flow more logically was a time-intensive task, but

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in the long run, it enabled me to find items more quickly and decreased the amount of time it took to fulfill requests.

I reviewed historical requests, purchase orders, and vendor files, identifying frequent users, types of items requested, and sources for materials. The types of requests also indicated what information was highly valuable to busy engineers. I began thinking about online databases to fulfill these needs.

> **"Instead of waiting for the regularly scheduled interoffice mail pickup, I hand-delivered books and journal articles to staff."**

WJE's library collection was extraordinarily pertinent and extensive, but underused. Engineers with chargeable time goals were reluctant to browse through books or find journals. What staff needed from the library (and, more importantly, from the librarian) were services that came to them. Established services needed to be enhanced and other services needed to be initiated.

Personal Delivery

The first service I enhanced was item delivery. Instead of waiting for the regularly scheduled interoffice mail pickup, I hand-delivered books and journal articles to staff. As I met these staff members, I introduced myself, informed them of additional resources on their topic, and encouraged them to call me if they needed more information. Many of them appreciated my fast response to their request and the offer of additional resources.

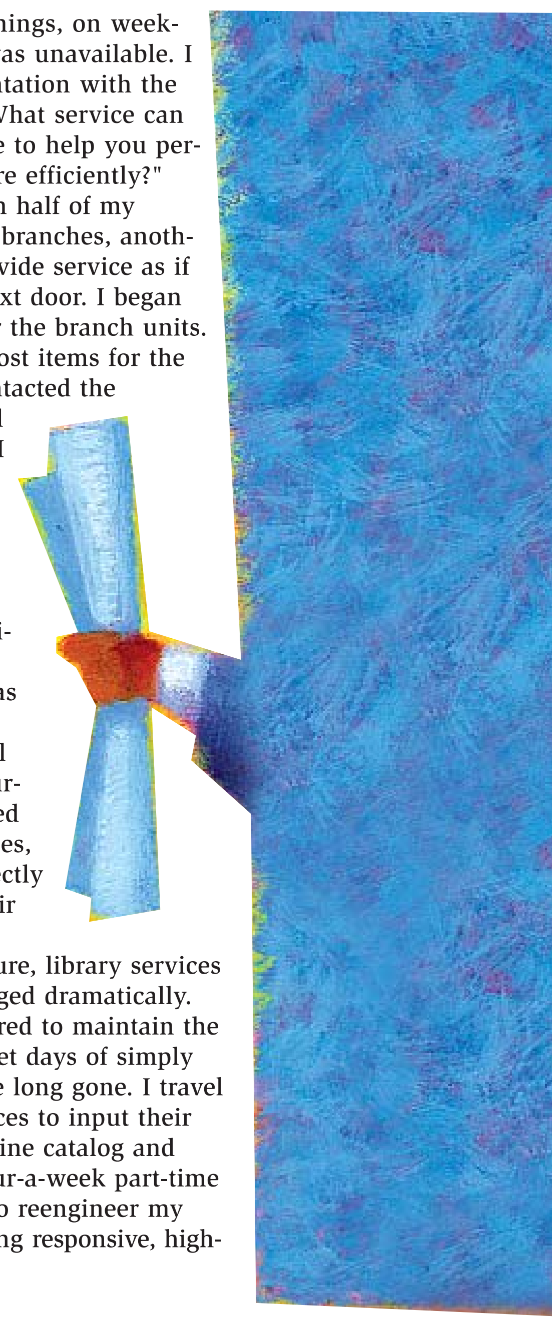
A relatively small effort on my part spoke volumes for my willingness and enthusiasm. It also demonstrated that I could perform research and provide more than just copies of journal articles. I was saving them time – a valuable commodity. After five months, I held a library open house to introduce the online catalog. Not all of the books were catalogued, but I thought it was more important to get the product out to the patrons. Over the next several months, I obtained network licenses for databases so that staff could immediately retrieve frequently used industry standards and building codes.

To educate them about the enhanced library services, I made presentations to the local engineers and architects. During their scheduled lunch hour (with the unit manager providing lunch), I accessed the intranet and showed staff exactly what was immediately accessible to them at their desktops.

For staff at branch locations, I gave "virtual presentations." Using Microsoft Netmeeting from my computer and a speakerphone, I demonstrated the products to which users had access and performed live searches. Remote staff viewed the presentation using a computer with an LCD projector. In addition to discussing the catalog and other online resources, I used the opportunity to talk about copyright and asked staff for their input on the library.

I stressed that these products were not made available as a means of pushing my responsibilities off on them; I was more than happy to provide them with the information. The online products were meant to enable them to access information in the evenings, on weekends, or when I was unavailable. I ended each presentation with the same question: "What service can the library provide to help you perform your job more efficiently?"

With more than half of my patrons located at branches, another goal was to provide service as if they were right next door. I began ordering books for the branch units. Before ordering most items for the main library, I contacted the unit managers and inquired whether I should also purchase a copy for their units. I stressed that the main collection should be their primary source for materials, but I was able to help them increase their local holdings. I also purchased work-related books for employees, with the costs directly deducted from their paychecks.



During my tenure, library services at WJE have changed dramatically. Although I was hired to maintain the collection, the quiet days of simply ordering books are long gone. I travel to out-of-state offices to input their books into the online catalog and supervise a 24-hour-a-week part-time clerk. I was able to reengineer my library by delivering responsive, high-quality services.

Do You Make Enough Money?

A Quick Tour of the SLA Salary Survey

By Cybèle Elaine Werts

A few years ago, I worked as a technical writer for a big computer company. I never thought all that much about whether I made more or less than the other employees – mostly software engineers – but assumed I was on par, if only because I had a master's degree and most of them didn't. One day I was updating a spreadsheet that listed all the employees and how many "credits" each had, which was the company's method of disguising how much we earned. It was pretty easy to figure out the relationship between the so-called credits and my actual salary, and I discovered to my horror that I was the lowest paid of some 40 people on the team. Not low, not medium low, but the bottom of the barrel. As you can imagine, I became wholly distracted from my work for some time. Knowing that I was pretty much slime – at least financially speaking – totally blew my image of myself as a white-collar professional. Maybe I would have been happier being ignorant.

I've always had a deep-seated obsession with knowing how much people earn, and yet I simultaneously keep mum about my own cash flow. Some people spill their finances willy-nilly, which I consider a reflection of bad personal boundaries. I've also found that people who earn less than I do (which is just about everyone here in salary-poor Vermont) become uncomfortable if they know that number.

Reading the SLA Annual Salary Survey for 2004 fed my curiosity, because I got to know everyone else's salary. The good news is that this time my salary is not floating among the muck... and what a relief that was! My compliments to John Latham, director of information for SLA and editor of this excellent publication. The report is clearly written, includes a solid amount of detail, and covers all the areas on which I would want data.

While my current yearly earnings are quite a bit under the New England median of $64,000, there is hope, because this average is just a beat off from the $64,082 that Pacific Coast information specialists earn, making us the two highest, paid geographical areas (p. 56). In fact, information specialists in most of the country earn less than I do, starting at a low of $46,625 in the East South Central area of the United States, which includes Alabama, Kentucky, Tennessee, and Missouri. My sister information specialist Melissa works in Alabama, so I wonder how she feels about this.

Where Do You Fit?

I also earn less than the $60,000 median for people with a master's degree, but this may be because my graduate work was in educational technology, not in library science (p. 59). Considering that I am just about two years into this career, officially speaking, I am earning more than the median for two or less years of experience ($40,000) or three to five years ($47,000), which indicates that I'm either lucky or possibly just brilliant at my job (p. 59). Finally, I find that I'm in the ballpark for a workplace with 500 to 999 employees that is nonprofit, academic, and a federally funded (in part) institution

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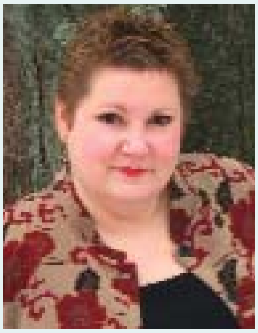

If You Have Questions...

By Cybèle Elaine Werts

I had some questions about the report, which I addressed to the editor John R. Latham, the director of the SLA Information Center.

Information Outlook: On page one of the survey, you say that of the 3,054 completed, only 2,539 provided enough information to be included in the analysis. Can you explain what you meant by that?

Latham: Actually, you have highlighted a small error in the report, which has been amended: 3,287 members started the online survey, but a number of them either did not complete the survey or there were errors in the responses, which meant that we could not use the data. This rate of error is larger than the 2003 rate of 2 percent. I don't know why this happened.

IO: On page 2, the chart shows that you only got a 26 percent response rate, which is quite a bit lower than the 40 percent +/- rate in the last few years. Considering that it's easier to complete a Web survey, and considering that information specialists are probably more technically savvy than most, how do you explain this low response rate?

Latham: The actual response rate in 2004 was 31 percent, not 26 percent, which compares with 37 percent in 2003 and 46 percent in 2002. We do not know why the response rate has dropped so much in the last two years. The year 2003 was the first year of the online survey, and in 2004 we did increase the survey population to 100 percent of U.S. SLA members. I can only surmise that members are becoming weary of completing online surveys, or the less "techie" ones are nervous about completing online surveys. In 2002 we asked a question about whether respondents would complete an online survey if we submitted one in 2003, and 82 percent of the respondents answered in the affirmative.

IO: On page 2, you describe how each chapter relates to the jobs as they are described there. Does this section relate directly to the survey instrument on Appendix A, page 5?

Latham: Yes. We use the specific job responsibilities and combine them in the most appropriate chapter heading.

IO: I found that because the report was shown in table format, you could only look at one descriptor - such as ethnicity, gender, or geographical area - at a time. I understand that you offer free use (with purchase of the survey) of your online salary calculator, which can figure out your salary with multiple descriptors at once.

Latham: We added the Salary Calculator as an additional feature in 2004 as an online interactive tool to analyze salaries based on multiple characteristics. We have not received feedback yet on the Salary Calculator, which I hope is a good sign.

IO: What activities are the national associations taking on to increase minority representation in the profession?

Latham: SLA is active globally in promoting diversity within the information profession at headquarters, chapter, and division levels. We have the Diversity Leadership Development Program Award, which was developed to help accelerate the advancement and visibility of people from groups traditionally underrepresented in the association's membership by mentoring them for leadership opportunities within SLA. Chapters and divisions also have their own diversity programs.

The 2004 SLA Annual Salary Survey is available as a PDF download. The cost is $55 for SLA members; $125 for others. For ordering information, see www.sla.org/salarysurvey2004.

(pp. 61 and 62). Could be a lot worse.

Sadly, I make less than either women ($57,300) or men ($63,000) as a whole, and I am horrified that there continues to be such a gap between women's and men's salaries for the same job (p. 60). Looking at the salary distribution by ethnicity/race chart on page 60, I notice that minorities of all types are still woefully underrepresented in the profession. While salaries for all ethnicities tend to land near $60,000, Native Americans/Alaskans are at the peak, earning a median of $65,000, while Hispanics are at the bottom, at just under $50,000. However, these averages have less meaning when you see that only 25 Native American/Alaskans and 44 Hispanics were represented.

Whites are by far the majority with 2,088 out of 2,320 total respondents. I mentioned this in my discussion with Daphne, an information specialist in the Pacific region, the area with the highest average salary. She replied, "What activities are the national associations taking on to increase minority representation in the profession?" Good question, Daphne, and one that SLA addresses in the sidebar to this article.

Geography and other factors provide a context. You might ask, "How much am I earning compared with other jobs where I live?" or "Am I being paid on a local or a national scale?" I'm in an unusual situation, because I work for a relatively small company in Vermont, but it is part of a fairly large national company.

We are paid on a national scale, which means I'm earning a heck of a lot more than I'd ever earn at most other Vermont jobs. In fact, I looked for a new job a few years ago when our federal funding was winding up. Every single local employer paid $10,000 less than I was then earning! On the other hand, considering that I am being paid on this national scale, you might think I'd be earning something closer to the average for New England, but not so. Still, I'm an optimist, and I have a job I love with top-notch benefits, so no complaints from this peanut gallery.

One particularly interesting phenomenon is that as my career progressed, each new job offered a higher salary, even when it wasn't necessarily a move up the career ladder. Twelve years ago, when I first moved to Vermont, I was happy to be earning $24,000 as a computer training coordinator. Today I'm making more than twice that, and have never had a job that paid less. In some inexplicable way, my expectations and confidence translated to a higher salary. This despite living in a state where the average salary is less than that $24,000 I earned at my first job. The chief administrative officer of our parent company recently commented to me that salary levels work something like this: "First you read the books, then you write the books, then they write a book about you." I suppose I'm in the second stage, fantasizing about the third.

Need to Know

What does all this have to do with the SLA Annual Salary Survey? Actually, quite a lot. You might ask why anyone would pay to find out where in the barrel they float, but it's more than that. Having this kind of information gives you data for negotiation, and, as we all know, information is the foundation of our work. It helped me develop reasonable expectations about my own possible future salary, as well as where to put my efforts in terms of the factors that affect my earnings.

For example, while we can't change our gender without a great deal of effort, we might consider focusing our professional development efforts on getting an advanced degree, working for a for-profit organization, and increasing our skills in database development and people management – all of which the report indicates increase earning potential. Daphne added that if she were considering an advanced degree or additional certification, information on salary distribution based on primary job responsibility might influence her choice of focus areas.

She said, "It would be interesting to know if the range in salaries between areas of responsibility is based on availability of staff in that area or perceived difficulty of the work or something else." Being a chief information officer or vice president can also top your salary out at $100,000, but I figure I'm not all that likely to get there, considering how cranky I get when I'm required to manage people.

I asked Daphne what would make her pony up the $125 (nonmember, but only $55 for members) cost of the report, and she responded, "It would make sense for someone who had multiple uses for it, like a large human resources department that had several people who fell under these job descriptions. A library might also purchase it for a reference tool." My friend Melissa took a more personal tack, saying she would find it very useful to research a future career, particularly in knowing what to focus on to move up.

Information is power, and I like knowing how to leverage this power, both professionally and personally. I'm glad to know that I'm not at the bottom of the barrel, even if I'm bobbing along the whitewater rapids when it comes to pinning down exactly how much I should be earning. Who knows? Maybe I'll take the report with me to my next job review and see about asking for a raise.

coming events

March 2005

Part 1: Identifying Client Needs-The Process
March 9
http://www.sla.org/virtualseminar

15th European Business Information Conference (EBIC) TFPL, Ltd.
March 2-4
Seville, Spain
http://www.tfpl.com/about_us/press_centre/press_releases.cfm?pressreleases=69

Computers in Libraries 2005
Information Today
March 16-18, 2005
Washington, DC, USA
http://www.infotoday.com/cil2005

1st International Conference on Information Management and Business (IMB 2005)
Shih Chien University
March 16-27
Taipei, Taiwan
http://www.im.usc.edu.tw/imb2005

Part 2: Identifying Client Needs-Using the Findings to Shape Information Provision
March 23
http://www.sla.org/virtualseminar

Arabian Gulf Chapter 11th Annual Conference & Vendor Exhibition
March 29 - 31
Al Ain, United Arab Emirates
http://www.sla.org/chapter/cag

April 2005

Part 1: The Art of Negotiating Anything
April 6
http://www.sla.org/virtualseminar

SCIP 20th Annual International Conference and Exhibition
Society of Competitive Intelligence Professionals
April 6-9
Chicago, IL, USA
http://www.scip.org/05annual

ACRL 12th National Conference
April 7-10
Minneapolis, MN, USA
http://www.ala.org/ala/acrl/acrlevents/12thnatconf/12thnational.htm

Buying & Selling eContent 2005
Information Today
April 10-12
Scottsdale, AZ, USA
http://www.buy-sell-econtent.com

Part 2: The Art of Negotiating Anything
April 13
http://www.sla.org/virtualseminar

19th Annual AIIP Conference
Association of Independent Information Professionals
April 13-17
Tucson, AZ, USA
http://www.aiip.org/Conference/2004/

Positioning Yourself as a Leader within your Organization
April 27
http://www.sla.org/virtualseminar

May 2005

14th International World Wide Web Conference (WWW2005) IW3C2
May 10-14
Chiba, Japan
http://www2005.org/

Part 1: Weblogs- Opportunities for Special Libraries
May 11
http://www.sla.org/virtualseminar

Globalization of Information: Agriculture at the Crossroads
IAALD and USAIN
May 13-22
Lexington, KY, USA
http://www.ca.uky.edu/AIC/conf_home_2.htm

MLA '05
Medical Library Association
May 14-19
San Antonio, TX, USA
http://www.mlanet.org/am/am2005/

AIIM Expo
May 17-19
Philadelphia, PA, USA
http://www.aiim.org/

Part 2: How to Start a Weblog: Tools, Tips and Techniques
May 25
http://www.sla.org/virtualseminar

June 2005

CoLIS 5: Fifth International Conference on Conceptions of Library and Information Science
University of Strathclyde
June 4-9, 2005
Glasgow, Scotland, UK
http://www.cis.strath.ac.uk/external/colis5/

SLA 2005 Annual Conference
June 5-8
Toronto
http://www.sla.org/toronto2005

Joint Conference on Digital Libraries 2005 (JCDL)
June 7-11, 2005
Denver, CO, USA
http://www.jcdl2005.org/

2005 CLA Conference
Canadian Library Association
June 15-18, 2005
Calgary, Alberta, Canada
http://www.cla.ca/conference/2005/proposals.htm

July 2005

7th ISKO-Spain Conference: The Human Dimension of Knowledge Organization
University of Barcelona
July 6-8, 2005
Barcelona, Spain
http://bd.ub.es/isko2005/en

AALL 2005 Annual Meeting
American Association of Law Libraries
July 16-20, 2005
San Antonio, TX, USA
http://www.aallnet.org/events

August 2005

Sixth World Conference on Continuing Professional Development--Preparing for New Roles in Libraries
IFLA
August 11-13
Oslo, Norway
http://www.ifla.org/IV/ifla71/calls-e.htm#cpdwl

World Library and Information Conference: 71st IFLA General Conference and Council
IFLA
August 14-18
Oslo, Norway
http://www.ifla.org/IV/ifla71

September 2005

Hypertext 05
Association for Computing Machinery (ACM)
September 6-9, 2005
Salzburg, Germany
http://www.ht05.org

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

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

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

index of advertisers

SLA Notices

What to Do If You're Accused of Copyright Infringement

By Lesley Ellen Harris

You may receive an e-mail, regular letter, or telephone call or otherwise be notified by a copyright owner or a lawyer that you are infringing on a copyright. The claim may relate to an article published in your newsletter or a photograph on your Web site. Often this notification states that if you do not take steps to remedy the situation – either by paying an "after-the-fact" copyright license fee or stopping any and all use of the content – the copyright owner will institute a court action. Do not panic. Take the time to understand the claim and determine what option makes most sense for your library or organization in the circumstances.

You're accusing us of what?

What exactly is copyright infringement?

Copyright infringement is the act of using the copyright-protected work of someone else (a book, an article, a song, etc.) without permission. If a work is protected by copyright, libraries generally cannot legally make it available to the public in any format, digital or otherwise, without the permission of the copyright holder.

Determine the Validity of the Claim

If you receive what in legal jargon is called a "demand letter," your first step is to review the materials specifically mentioned in the claim of copyright infringement. Are you using these materials? Are you using them in the manner claimed in the demand letter? If so, are they still protected by copyright or are they perhaps in the public domain? Are they the kind of U.S. government documents for which copyright does not exist? Have the materials been donated to your library, and did you receive an assignment of copyright with that donation?

If permission is required to use these materials, have you, in fact, obtained permission? Any permissions you receive should be in writing and part of a database that is easily accessible. Check the permission or license. Does it cover your use? Have you followed the terms and conditions in the license? Perhaps you obtained a license to put the material on your Web site for six months, but it has been there for a year. After the six-month period of use has expired, you could be in breach of copyright.

The license may also state that only a certain number of authorized users may have access to the content. For example, a library may obtain the right to post an article about literacy on its Web site for a weeklong program on alternative dispute resolution. The license states that the Web site must be password-protected and may issue only 50 passwords. If you make the article accessible for longer than one week or grant permission to more than 50 users, you could be violating your license and subject to a claim of breach of contract or copyright infringement, or both.

Is It Fair Use?

If you are facing a claim of copyright infringement, you may turn to fair use as a defense; however, this provision in Section 107 of the U.S. Copyright Act is confusing and difficult to apply to particular uses of copyright-protected material. It must be applied on a case-to-case basis, and non-lawyers and non-judges often are put in the position of determining what may be considered fair use. Many individuals and librarians do not want this responsibility, but it may be too costly to get a legal opinion each time you wish to apply fair use to a particular use of content.

Fair use is primarily for the use of copyright-protected work for commentary, parody, news reporting, research, and education. The Copyright Act lists four factors that will help you determine whether a usage is fair use. These factors relate to the purpose and character of the use, including whether it is of a commercial nature or for nonprofit or educational purposes; the nature of the copyright-protected work; the amount and substantiality of the portion used in relation to the copyright work as a whole; and the effect of the use on the potential market for or value of the copyright-protected work. Commercial uses are less likely to be considered fair use.

Examples of uses that may be fair use are quoting

Lesley Ellen Harris is a copyright lawyer/consultant who works on legal, business, and strategic issues in the publishing, content, entertainment, Internet, and information industries. She is the editor of the Copyright & New Media Law Newsletter: For Libraries, Archives & Museums *and the author of several books, including* Licensing Digital Content, A Practical Guide for Librarians. *She often speaks at conferences and teaches online courses on copyright and licensing. For more information, see http://copyrightlaws.com.*

excerpts in a review or criticism for purposes of commentary; quoting short passages in a scholarly or technical work for clarification of the author's discussion; and reproducing material for classroom use when the reproduction is unexpected and spontaneous – for example, using an article from this morning's paper that is directly relevant to today's class topic.

Contact Your Lawyer

Once you have gathered factual information about whether the claim against you is valid, discuss the issue with your legal counsel. If possible, deal with a lawyer who has experience in intellectual property claims. Provide your lawyer with your license agreement (if you have one) and any other documents that support your position. Discuss your options with your lawyer. If the claim does not seem valid, your lawyer may advise you to ignore it or to let the other party know that you reject the claim and will continue to use the content. If your use is not legal, you may wish to stop using the content or negotiate with the copyright holder to pay a copyright fee.

Channeling My Next-Gen Device

By Stephen Abram

I'm cheating on my Palm Treo™. It's sad but true: I am the Post-it Note™ of lovers. I thought I'd never look at another PDA, but I'm already eyeing PT's younger, newer, shinier sibling – with its clearer screen, swappable battery, and Bluetooth. Why is it that I can stay happily married to the same woman for more than 30 years yet want to trade up my gadgets every year – even though, in the first blush of infatuation, I invariably sign two-year contracts? Sigh.

PT and I met when I was looking to purchase my first corporate phone. It was important that the phone meet several criteria. My position requires that I investigate the latest technologies that will affect information users and libraries of all types. This can be accomplished only partially using my desktop and laptop. I also travel a lot and need access to services worldwide – it isn't enough to see electronic services on PCs, which are oh-so-last-century.

Wireless PDAs outsold simple cell phones last Christmas – that's a key marker. When cassette tapes outsold vinyl, when CD-ROM outsold cassettes, and when DVD started outselling VHS, the bell was tolling for the transition to a new mode. My inner compass told me that I needed to experience this new end-user world of information appliances, and fast. If the PDA was emerging as a critical component of the information user ocean, then I'd better work (actually, play) with it. So I got my beloved Palm Treo.

The love affair actually started earlier. I was sitting in the lobby bar of the Washington, D.C., Hilton Hotel and Towers at the Computers in Libraries conference last year. Jenny Levine (librarian extraordinaire and leading librarian blogger at www.theshiftedlibrarian.com) was sitting beside me, taking advantage of the free wireless. (Librarian/traveler's tip: Hotels make more profit from the drinks in the bar than from the $9.95/day Internet connection in your room, so they're likely to offer a free connection in the bar. I've noticed at library conferences that the bars are lit up by more laptop screens than candles.)

Anyway, Jenny had a really cool new phone. It even had a removable chip with her favorite Simpsons episode on it. She was e-mailing, listening to MP3s, surfing the Web, and making phone calls – all on her PDA. I was enthralled. I went home and surfed the reviews and found that the Palm Treo was the PDA of the moment. On her blog, Jenny chronicled her experiences with her PT. I followed along and waited patiently for a few months, until it came to Canada.

It arrived and I fell in love. After a few weeks of setup and a month of reading the hard-copy manual (which is four times the size of the phone), I've found it to be a great productivity tool. On half-hour rides to the airport, I can check my e-mail or read Word or PDF files. In hotel rooms and at conferences, I use the hands-free speaker to conduct teleconferences. When my laptop can't find a wireless signal, I can still check facts on the Web.

In a pinch, I can even use my wireless keyboard peripheral to build Word documents or PowerPoint presentations. A colleague told me that his company has converted almost completely to the PDA for driving the PC projector for PPT presentations. Gotta try that! All in all, it was worth the effort to get it going. I feel connected (mostly) to the office, my professional network, and my family, seamlessly and all the time. I am much more productive than I was before, and I've even learned to take PDA-free time to stay human. (By the way, the digital camera still stinks.)

So what does this have to do with special libraries?

These devices – Blackberries, Palm Treos, HP iPacs, fancy phones, etc. – are ubiquitous. Most of our key users in the special library world have some form of these devices. They are especially popular in auditing firms and the military, among consultants and executives, in medical enterprises, and for salespeople and investment and finance pros. Many of our colleagues use them, too. The student population is among the most deeply penetrated markets. If our users are getting addicted to these devices (and many are), and they are starting to use them in preference to laptops and desktops, what

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do our services look like? Those of us who serve adult users and fellow employees still have time to catch up; those who provide library services and information support to students have considerably less time, since they have adopted these devices at a much faster rate. Here are a few key questions:

1. Do you have a PDA and use it? If you don't, you can't understand the environment of your users. This isn't one of those "I don't have to be a chicken to understand an egg" issues. This is experiential learning at its finest. Once you have experienced the features and functions, you can address usability issues at a more informed level. I'm not saying that it's a perfect environment, any more than our carpal-tunnel-inducing desktop environment is. But it's where the users are, and that's where we have to be.

2. Do you know what your e-mails and alerts to users look like on a PDA? This is important! Do your attachments work on their device, or will they have to wait to get to the office to see your brilliant search results or answer? If they need it now, you're not meeting their needs. Can you coach them (or your IT folks) to provide the right applications for great information experiences? If you know that the e-mail will be read on a PDA, you should be crafting it for that environment – short, punchy, accurate, plain – just as you write in different styles for the Web, e-mail, print, or a textbook.

3. Have you seen your Web sites on a PDA screen? If you deliver many of your services through a Web site or intranet, you'd better check. Sometimes (more often than we'd like) they just don't display well or are too graphically intense to download quickly. This is what XML-based Web design does really well: It can sense the device it is arriving at and modify its display sensitivities to display well – to actually be readable. That's pretty cool, and it doesn't require you to maintain multiple sites for different devices. As a side benefit, XML-based design also gives you a better foundation for ADA compliance.

4. Have you tested your intranet's usability on the PDA? Can you or your users easily sign in? Are your firewalls blocking the domains of your users' telecommunications providers? Can you improve usability with some authentication procedure? After they get into the intranet, will users discover that the best information is locked in PDF format, for example, and they lack the PDA application to read it? Does information get delivered before frustration develops? A frustrated user is not in the right frame of mind to adopt new information, no matter how good, and apply it effectively to meet the business or enterprise need.

These are simple things to test. They're simple things to fix. What you don't know can hurt you.

These PDA devices are no longer toys or gadgets for the innovator and early adopter populations. They are not status symbols for the rich or geeky. They are not just for teens and Millennials. These devices, in all their variety, are mainstream, and users have a right to expect that our information and library services will work well in this environment.

Now you do know how to IM or SMS through your PDA phone, right? Welcome to the thumbster world. You'll soon be keying 30 words a minute with your thumbs, serving a global population of users as their personal information coach.

Information Portals

By Carolyn J. Sosnowski, MLIS

"What is your experience with XYZ automation product?" "How do I plan a library move?" "Do you have examples of user surveys?" "My employer wants me to prove my value. Now what?"

These questions are typical of requests I see on SLA's discussion lists and receive here at headquarters. Many of our members are solo librarians who rely on electronic networking and their professional association to help them solve problems and get ideas for new services and products. We are fortunate to have a community that is so knowledgeable and willing to share its experiences.

I try to use every opportunity to promote our information portals (or, more accurately, your information portals). I was thrilled to discover them myself before I began working at SLA and used several of them to improve my knowledge in areas such as information audits and marketing, initiatives in which our resource center was involved.

What is an information portal? It's a collection of resources on a particular topic of interest to information professionals. Currently, the SLA Web site offers almost 50 portals, on topics ranging from copyright to career planning to vendor reviews. In the past year or so, we have added portals on blogging and RSS, open access, taxonomy, and communities of practice. We continually monitor trends and discussion lists for ideas for new portals, and we welcome suggestions.

The portals are composed of various kinds of resources, most commonly article and monograph citations and Internet links. Whenever possible, links are provided to the full text of articles, presentations, and reports. Although full text is not always available, you can find many of the listed resources through the online services you use in your information centers. In the portals, you will find best practices, experiential articles, reviews, and ideas for creating and expanding your services.

Most of the portals have been edited in 2005 for currency and relevance, and they are continually updated with new content from professional journals, conference proceedings, industry reports, and resources gleaned from the SLA community. A few – including the career planning and competencies and vendor products portals – will undergo major revision in the coming months to make them easier to navigate. Cross-references will be added to some portals, so you can easily link to portals on related subjects. If you have resources you would like to add to a portal (your own conference presentations, for example), let us know at resources@sla.org. In this way, you can share valuable information with the rest of the membership.

You will find the portals at www.sla.org/infoportals.cfm.

Management Documents Collection

Another way to contribute to information exchange is to share resources that you have created in your information centers. In the July 2004 Information Management column, we requested sample documents from members in order to revitalize our management documents collection, which had become outdated. The user surveys and policies, for example, will be shared, for a small fee, with members who request such items. As a bonus, contributors will receive a free packet of documents.

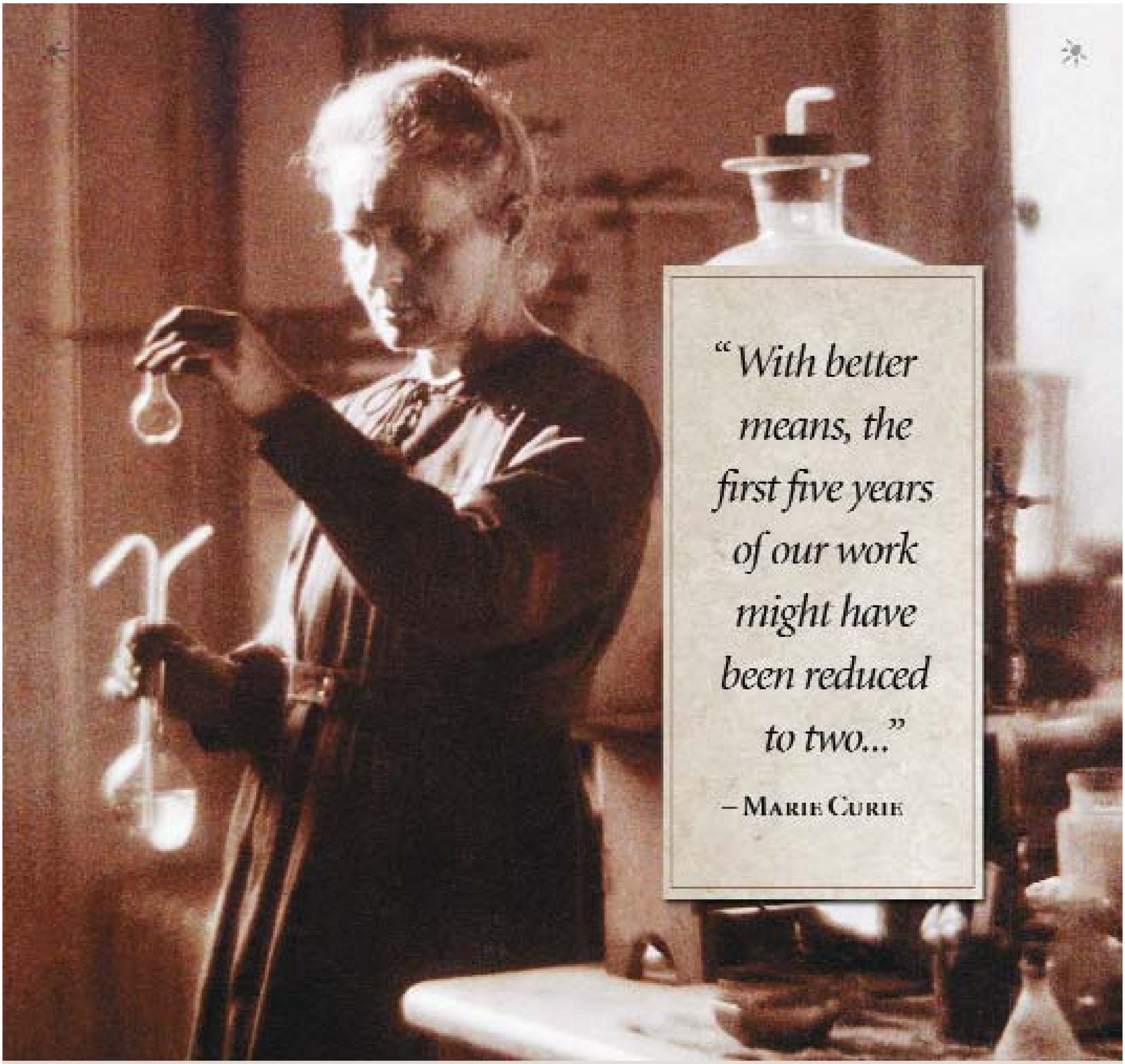
In response to our request, we received several contributions from members. Thank you! However, we did not receive as many samples as we had hoped for and would like to collect additional material before making the packets available to the membership.

What are we looking for? So far, we have received great examples of user surveys, purchasing policies, and newsletters. We'd like to get more of these samples, as well as brochures, mission statements, floor plans, and any policy documents you have created. Submissions in electronic format are preferred, but hard copy samples are also welcome.

As I am sure you have seen from the discussion lists, there are many requests for this type of information-templates that members can build on for the needs of their own information centers. What works for one office may not work for another, but sharing among colleagues can spark ideas and get the ball rolling in the challenging task of creating a marketing tool or collection development policy from scratch. I think we are all looking for ways to communicate with our clients, streamline processes, and best serve the needs of our organizations. If you have created ways to accomplish these goals, please share them with us.

Send your samples to resources@sla.org. Your fellow members thank you.

Carolyn Sosnowski, MLIS, is an information specialist at SLA.


"With better means, the first five years of our work might have been reduced to two..."
– Marie Curie