San Jose State University

SJSU ScholarWorks

10-2016

Information Outlook, September/October 2016

Special Libraries Association

information
outlook

THE PRACTICE OF LIBRARIANSHIP

information outlook

THE MAGAZINE OF THE SPECIAL LIBRARIES ASSOCIATION

The Practice of Librarianship

Communicating, teaching, and organizing aren't what draw people to librarianship, but librarians can't be successful without these skills.

BY STUART HALES

When people talk about librarianship, they often use words like *books*, *magazines*, *science project*, and *borrow*. When professors talk about librarianship, they use words like *visualization-ization*, *retrieval*, *preservation*, *curation*, and *digitization*.

What about librarians themselves? They're more likely to talk about the everyday practice of librarianship, so they use words like *teach*, *communicate*, *connect*, *plan*, *manage*, *organize*, *find*, *share*, and *copyright*.

This issue of *Information Outlook* offers several perspectives on the practice of librarianship. From Rajesh Singh teaching his LIS students at St. John's University to create strategic plans for information organizations to Hal Kirkwood experimenting with concept maps to help engineering students select the optimal database for their research to David Stern reviewing remote service technologies that can help librarians collaborate with each other and their clients, this issue of *Information Outlook* explores the roles that SLA members fill each day and the challenges they face in performing their normal duties.

Catherine Lavallee-Welch, in her interview in this issue, sums up the practice of librarianship for many SLA members.

"In higher education, we have to deal a lot with budget cuts and the ever-rising prices of resources," she says. "That's where prioritizing and strategizing are important. Of course, when you are an administrator, a director, you have to deal with a certain amount of office politics. You have to make sure that you communicate the value of your unit to the rest of the organization and that you can advocate properly for resources."

Jaye Lapachet, in her discussion of the Competencies for Information Professionals and specifically the competency that addresses the organization of data, information, and knowledge assets, offers another common take on the practice of librarianship.

"It is critical that we train others in effective practices for information organization and management, because content management starts at the point where a user chooses to save a document," she writes. "A trained and qualified information professional can teach others about metadata application at the desktop level, so the foundation of the content management plan can start where the information is being created. It is also important for information professionals to provide high-quality,

relevant tools to ease findability and ongoing access."

Prioritizing budget needs, training others to organize and manage information, and providing tools to increase findability and access are hardly sexy stuff. And many of the skills they require, such as communication, project management, and organization, often aren't taught in library school. But in librarianship, as in many other professions, success is often built on painstaking efforts behind the scenes--face-to-face discussions with colleagues, attention to details, trial and error, and repeated adjustments--so that what's done in public appears easy and seamless.

Kayleigh Ayn Bohémeier and Melanie Maksin, in their article about teaching Google workshops to students at Yale University, provide a glimpse of what their efforts have entailed.

"The process of designing and implementing workshops has been iterative, and there is no perfect session sequence," they write. "Even within sessions, Google update releases can lead (and have led!) to last-minute shifts in how we plan to teach the content. As with teaching most skill sets, we need to continue to adapt and engage with our users to continue meeting their needs."

To learn more about the practice of librarianship, turn the page. **SLA**

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

2018 PRESIDENT · CALL FOR VOLUNTEERS · CONFERE

Sarmiento to Head SLA in 2018 as President

Roberto Sarmiento, head of the Transportation Library and acting director of the Distinctive Collections Workgroup at Northwestern University, was elected by SLA members to serve as the association's president in 2018.

Roberto has been an SLA member since 1989 and has served in several capacities, including chair of the Transportation Division and the Bylaws Committee. He will join the SLA Board of Directors in 2017 as president-elect, become president in 2018, then serve as past president in 2019.

The following SLA members will join Roberto on the board in 2017:

Roberto Sarmiento

- Emma Davidson, Chapter Cabinet Chair-elect;

- Laura Leavitt, Division Cabinet Chair-elect;

- Zena Applebaum, Director; and

- Barbara Kern, Director.

The new board members will serve three-year terms beginning 1 January 2017. They will replace the following members, who are finishing their board terms at the end of this year:

- Jill Strand, Past President;

- James King, Past Chapter Cabinet Chair;

- Juliane Schneider, Past Division Cabinet Chair;

- Moy McIntosh, Director; and

- Karen Reczek, Director.

The election was conducted online beginning September 7 and ending September 21. The candidates were put forward by the SLA Nominating Committee: Anne Barker (chair), Tony Landolt, Saif Al-Jabri, Valerie Perry, and Hal Kirkwood.

Call Issued for Volunteers

SLA members are being urged to volunteer to fill open positions for 2017 on association committees and councils and in local chapters and divisions.

"How has SLA advanced you along your career path?" asked 2017 SLA President Dee Magnoni in a letter to SLA members. "Throughout the month of October, we are asking you to consider how you can use your passion, skills, and time to give back in 2017—and to play an integral part in continuing our onward motion, both as an association and as a thought leader in the information industry. **We need volunteers in a broad array of positions**—committee members, membership chairs, article authors—to serve on committees or councils, in your local units, or in SLA's virtual information hubs."

SLA members interested in volunteering can specify the roles that interest them by completing a form posted on SLA's website. The form is available until October 28. Volunteers who are selected to fill open positions will be notified in November.

In her letter, Dee listed three compelling reasons to volunteer with SLA:

- Volunteering with SLA develops your leadership skills and also looks great on a résumé.

- Volunteering for your unit (chapter, division, or caucus) helps support and enhance the focused services and offerings available to you and your fellow unit members.

Emma Davidson

Laura Leavitt

Zena Applebaum

Barbara Kern

NCE PROPOSALS AND SPONSORSHIP

• Volunteering is now even easier to fit into your busy schedule. Consider a micro-volunteering opportunity—author an article for *Information Outlook*, speak at an event, or provide helpful resources for the SLA website.

"Thanks to all of you who generously offer your input, time, energy, and resources to SLA," she concluded. "I am both proud and grateful to be a part of this community, and I hope to work more closely with you in 2017!"

Members Invited to Submit Proposals for SLA 2017 Sessions

In a break with longtime practice, SLA members as well as units are being invited to submit workshop and session proposals for the SLA 2017 Annual Conference in Phoenix.

Information was posted on SLA's website explaining the submission process and providing submission guidelines. Those interested in submitting proposals are asked to consider whether and how their session will relate to the Core Competencies for Information Professionals, which SLA revised earlier this year. They are also asked to provide the following information:

• The thematic "stream" (if applicable) in which the proposed session or workshop will best fit: (1) Leadership, (2) Data Management, (3) Intellectual Property, or (4) Metrics, Analytics, and Assessment.

• The level of content of the sessions or workshop: fundamental, intermediate, or advanced.

• The time frame for the presentation: 20 minutes (Quick Takes), 60 minutes, 75 minutes, or 90 minutes.

Proposals can be submitted through Wednesday, October 26. Members whose proposals are accepted will be notified before the end of the year.

Board OKs Two Options for Conference Partnership and Sponsorship Arrangements

The SLA Board of Directors approved a framework for headquarters staff and unit leaders to collaborate more effectively on conference sessions and workshops, enabling units to concentrate on developing high-quality content while headquarters staff procure partners and sponsors to cover the costs of the units' activities.

Under the terms of the framework, units may select one of the following two options for sponsoring their conference sessions and/or events:

(1) Plan their sessions and events as they have in the past, obtaining their own sponsors with no assistance from SLA headquarters; or

(2) Allow SLA staff to secure sponsorships for their sessions and events.

"It is our desire to create a collaborative and synergistic environment between SLA and the units during the entire process and production of the Annual Conference," the framework states. "The intention of SLA is to ensure that all stakeholders involved in the Annual Conference work toward a common goal of creating an experience that continually supports SLA's mission to promote and strengthen the special library and information professional field through learning, advocacy, and networking initiatives."

Units must select their preferred option no later than Thursday, October 27. Units that choose the staff option will have their web hosting fee ($50) for 2017 waived and will receive a free kiosk in the SLA "Main Street" unit pavilion and networking lounge, which will serve as a hub for SLA 2017 attendees. **SLA**

The Role of Communication in Project Management

SUCCESSFUL PROJECT TEAMS COMMIT TO OPEN, REGULAR COMMUNICATIONS THAT ENABLE THEM TO ACHIEVE THEIR GOALS WITHOUT RESORTING TO TOP-DOWN AUTHORITY PROCESSES.

BY RAJESH SINGH, PHD

Work in libraries and information organizations continues to become more project-driven and collaborative in nature due to rapid changes in technology (including innovations in collaborative communication technologies), the evolving nature of human-information interaction, and changing work styles. As a result, formal project management training for information professionals is becoming more critical to success.

Unfortunately, even trained project leaders usually don't have enough authority to get things done as they would in a typical command-and-control organization. As a result, they have to obtain buy-in from co-workers to move projects and teams forward, often by using their powers of persuasion to influence others.

Although there is no magic formula for influencing others, effective communication certainly plays a critical role in that process and in determining the overall success of a project. The Project Management Institute's 2013 "Pulse of the Profession" report ranks effective communication as the most critical success factor in project management. But its importance is not reflected in its execution—in most organizations (including libraries), communication is the most challenging issue facing staff and leaders.

In this article, I will discuss communication strategies in highly successful projects that can be extrapolated to build influence in any kind of information setting. Furthermore, I will make the case for providing project management education in library and information science (LIS) schools.

Managing Projects through Effective Communication

In teaching the required management course in the Department of Library and Information Science over the past few years, I have asked students to create a strategic plan for an information organization of their choosing. These students are adult learners who hold either full-time or part-time jobs in various types of information organizations, including public, academic, and special libraries.

The students are organized into self-managed teams of three to four members. Teams are required to create a strategic plan by utilizing the team management and project management strategies they have learned, including

RAJESH SINGH is an assistant professor in the Division of Library and Information Science at St. John's University in New York. He teaches leadership and management courses and recently led the development of an online certificate in management for information professionals that is offered by DLIS. He can be reached at singhr1@stjohns.edu.

Tuckman's (1965) team progression theory, lessons from Harvey's (1988) Abilene paradox, de Bono's (1989) Six Thinking Hats methods, and so forth. They are also asked to select a project leader and a project secretary, create other roles appropriate to their project team, and document each member's roles and responsibilities in their team contract at the beginning of their project.

Moreover, they are asked to document the minutes of their project meetings. At the end of their project, these meeting minutes are used to write a two-page narrative about the team's accomplishments and dynamics. The critical role of communication in managing and ensuring the success of the project is strongly emphasized during class discussions.

In reviewing the narratives of highly successful project teams, it is clearly evident that effective communication is the most important contributor to project success. Following is a brief summary of some of the critical success factors that have emerged from the highly successful project teams. These critical success factors can be extrapolated for use in managing projects in any kind of information setting.

Develop a shared project vision. First and foremost, it is important that the project team collectively develop a shared vision of the final outcome and accomplishments. In the successful projects, the team members discussed the type of organization they were interested in, whether it be a special library, high school library, archive, public library, academic library, or other information organization. They also communicated with each other about the areas they wanted to focus on in their strategic plan, such as the outreach activities of the organization or the storage and preservation of the archival data. The clarity of their communications, especially regarding their project vision, served the teams well from the beginning.

Create a team contract. Another important factor that contributed to highly successful project teams was a well-thought-out team contract. Although team members were provided a template for their team contract discussion, they were creative in discussing and developing additional roles besides those of project leader and project secretary. They also discussed their strengths, weaknesses, and vulnerabilities in relation to accomplishing various components of the project. Their candid role discussions revealed how much they depended on each other to ensure the success of their project.

No matter what it is called, a mutually agreed-upon team contract is important to developing a sense of ownership, defining responsibilities, and promoting a sense of shared accountability among project team members. For instance, at Morningstar, a leading stock market analysis firm, employees work together to create formal agreements known internally as "colleague letters of understanding" (CLOUs). These CLOUs serve as contracts that articulate team members' commitments to the project team (Bernstein, Bunch, Canner, and Lee 2016).

Discuss project roles and responsibilities. In the highly successful projects, leadership emerged quickly—typically as soon as team members called the project initiation meeting to discuss the distribution of roles and responsibilities. Team members were also quick to discuss their project's scope and were upfront in establishing and communicating the deadlines of various milestones to be accomplished throughout the semester. In fact, they often established their own "artificial deadlines" (prior to the assigned final deadlines) so they would have plenty of time to accomplish their tasks should any unforeseen complications arise.

Discuss communication methods and frequency. The highly successful project teams used a variety of communication technologies, including Adobe Connect, Facebook, Skype, and Google Hangouts, in addition to more traditional communication tools such as e-mail, phone calls, and face-to-face interaction. As a result, geographical distance was not a barrier to maintaining an ongoing dialogue about their projects. They frequently engaged in passionate discussions about the progress they had made, milestones they had accomplished, and challenges they had encountered, and they were able to keep their regular project discussion meetings on schedule according to the plan they had prepared at the beginning of the project. This pattern of regular communications among project team members ensured that they remained on the same page during various stages of their project and made it easier for them to successfully handle any challenges or problems that arose.

Build consensus through brainstorming discussions. Successful project teams developed a consensus about their project ideas and strategy priorities by engaging in passionate brainstorming discussions. They communicated their meeting agendas ahead of time and took minutes of their meetings, which helped them coalesce around a shared understanding of the issues involved and agree on discussion topics for their next meeting. Their goal was not to reach a consensus simply by agreeing, but through systematic analysis, open dialogue, and frank discussion. Furthermore, they used Tuckman's team progression, the Abilene paradox, and de Bono's Six Thinking Hats framework to shape their discussions.

Celebrate milestones and accomplishments. In highly successful project teams, team members integrated humor and fun into their regular meetings and discussions, which made the project an enjoyable overall experience. They celebrated their milestone accomplishments by getting together over a pizza or participating in a similar event. These rituals helped create a safe, comfortable, and productive environment for the project team.

Recognize contributions. The highly successful project teams developed greater admiration and respect for each other through candid recognition of the

contributions of their members. In fact, they made sure, in their team contract, that the contributions of project members would be acknowledged and communicated in a transparent manner. They expressed sincere appreciation and gave kudos to each other when challenging tasks, such as the creation of SMART goals (specific, measurable, assignable, realistic, and time-related), were accomplished. This transparency in acknowledging contributions and accomplishments not only strengthened the sense of mutual trust and respect among team members, it also helped prevent social loafing (the tendency of individuals to put forth less effort when working collectively than when working individually).

Create trust through solid communication. By analyzing the strategic plan components of highly successful projects, it became obvious that frank and open communication throughout the various stages of the project helped create mutual bonds of trust among project members. The plan components also revealed that the team members' familiarity and previous work experience with each other helped facilitate smooth communication and created a positive climate within the team. When someone needed advice or needed help with a task, he or she could talk to any team member at any time and start from a healthy and positive place. These positive relationships fed off the initial commitment to open and frank communication and, in return, accelerated team members' ability to communicate with each other. By talking and listening to each other, showing appreciation, and giving and receiving honest feedback, team members were able to build trust in each other in a casual yet thoughtful manner.

Be open to project members' perspectives. One of the most important keys to the success of any project is an open and flexible attitude toward diverse viewpoints, thoughts, and perspectives. The project leaders created a safe and comfortable environment by being inclusive and respectful of their team members' opinions. They

saw their brainstorming discussions as opportunities to learn from each other and become acquainted with different ideas and perspectives; no idea was considered dumb or stupid. This tolerant, easygoing, and flexible attitude served team members well throughout the duration of their project, as reflected in their team narrative.

As these lessons make clear, the highly successful teams not only accomplished their project goals, they also created and implemented outstanding strategic plans by employing effective communication strategies and techniques. These strategies and techniques have obvious implications for today's information professionals as well as those engaged in developing workforce skills in the next generation of info pros. Education and training programs will need to draw on these strategies and techniques to equip future information professionals with the communication skills to help them build influence without authority and successfully manage projects.

Education and Training

The demand for workforce skills that meet today's needs and anticipate tomorrow's has long been a topic of discussion at professional LIS conferences. Project management and its associated communication skills have repeatedly been highlighted as critical areas of expertise by LIS practitioners and various professional associations, including the Special Libraries Association. However, most LIS schools are still falling short when it comes to offering project management courses on a regular basis.

In reviewing the online program and course descriptions of the 58 American Library Association-accredited graduate schools in the United States and Canada, I found that only a few of them (17.24 percent) offered a project management course in their curriculum. It is vital that the leaders of LIS schools, in conjunction with current practitioners, make a compelling case for providing project management education and training that will equip information pro-

fessionals at all stages of their careers with the skills they need to succeed in the workforce.

Careful Listening

Lacking authority, project managers must use their communication skills to influence others and accomplish their goals. They must find effective ways to communicate in order to create a culture of reciprocity and commitment among project team members. Project managers can foster this type of culture through dialogue, which includes careful listening in order to understand each person's unique perspective and role in the process.

This is perhaps the most challenging component of being a project manager, as it requires patience, empathy, and emotional intelligence to achieve. The reward is that team members will feel that their voice is being heard and that they are an important part of the process, which will help motivate them to take ownership of their roles and responsibilities. Investing the time and effort to build relationships through effective communication is what ultimately paves the way for project managers to build influence without authority. **SLA**

References

Bernstein, E., J. Bunch, N. Canner, and M. Lee. 2016. Beyond the Holacracy Hype. *Harvard Business Review,* July-August, 38-49.

de Bono, E. 1989. *Six Thinking Hats: An Essential Approach to Business Management.* New York: Little, Brown, & Company.

Harvey, J. B. 1988. The Abilene Paradox: The Management of Agreement. *Organizational Dynamics,* Summer, 17-43.

Project Management Institute. 2013. The High Cost of Low Performance: The Essential Role of Communications.

Tuckman, B. 1965. Developmental Sequence in Small Groups. *Group Facilitation: A Research and Applications Journal,* 71-72.

10 Questions: Catherine Lavallée-Welch

HER TRAVELS, HER CURIOSITY, AND HER SLA EXPERIENCES HAVE TAUGHT CATHERINE LAVALLÉE-WELCH SEVERAL SKILLS, INTRODUCED HER TO NEW PEOPLE AND IDEAS, AND BROKEN DOWN BARRIERS.

BY KATE VILCHES, MLIS

Few librarians can claim a career as geographically diverse as that of Catherine Lavallée-Welch. After graduating from the Université de Montréal, she worked in information services in Belgium and in her home province of Québec before moving to the United States and becoming the electronic resources librarian at the University of Louisville, where she was drawn into SLA. From Kentucky, Catherine moved to the University of South Florida Lakeland, where she started her managerial career while also creating the campus library from scratch. She is now the director of the library at the University of Wisconsin-La Crosse, in the city of the same name.

Catherine's SLA experience is nearly as diverse as her professional one. She has held roles in the Academic, Science-Technology, and Information Technology Divisions, chaired committees, and worked on task forces and now sits on the SLA Board of Directors.

Information Outlook asked Catherine recently about her involvement in SLA, how her international experience has influenced her librarianship, the skills that came in handy when she moved into library management, and the most unusual task she's performed in an academic library.

You've had a geographically varied library career—two continents, four countries, three states, and one province. What attracted you to the profession of librarianship in the first place?

Yes, you saw my not-so-clever tagline on LinkedIn. Well, what attracted me were . . . several things. I found out, and it was in a little bit of an indirect way, that I had an uncle who was an archivist for Quebec City, which for an archivist is one of the best places to work in the province of Quebec, and maybe all of Canada. Quebec City is one of the oldest cities in North America. Personally, I really like history. I like the humanities and social sciences, and I thought what he did was completely fascinating.

So, with my love of history and my natural curiosity, I thought being an

KATE VILCHES is senior research librarian at Lockheed Martin Missiles and Fire Control, where she focuses on competitive intelligence, engineering, and intellectual property research as well as resource evaluation and purchasing. Outside of her library duties, Kate is involved in the company's internal history museum. She can be reached at kate.vilches@lmco.com.
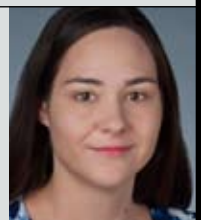
archivist would be really interesting. I did my undergrad degree in history, with a minor concentration in records and archives management. Then I started to work, and all the jobs I could find were in records management. I did that for a year. I wasn't too thrilled about it.

So I decided to go for my masters at the Université de Montréal. Doing the masters there, you could either choose a library path or an archive path. So I did the first year, which was the core courses, and I realized that the job market was not propitious—it wasn't very good for archival work. I decided to go to the "dark side," so I went into library. I specialized, in my second year, in indexing, and I've never done any kind of paid work in indexing whatsoever. I've always ended up more on the public services side of things, all the way to, now, being a manager, being a director of a library. I think that would be the way I got into the profession, a profession that I really enjoy.

I think it's awesome because I get to touch so many different things—there are so many different things you can do. I worked at the beginning of my career more with not-for-profit organizations and in the co-op sector. I did websites and intranets, and I was an information broker. I started a co-op of information services and worked on digital libraries with French-speaking organizations in Europe, and that's one of the reasons why I did work in Europe. When I moved to the United States in 2000, that's when I became an academic librarian. I had the opportunity to set up a new library, to try new things, and to benefit from the support of a lot of people.

I have to say, I've been very lucky in my career and I'm very grateful for it. I was lucky also to have a supportive spouse who let me move him across the country a couple of times.

You mentioned some of your work in Europe, and you've worked in the United States and Canada. How has your international library experience influenced the kind of librarian and manager you've become?

Catherine Lavallée-Welch

I think any kind of travel opens your mind to how people live, how people think elsewhere. You can get culture shock, but I think it's a very good thing, especially when you stay in a place long enough that you have to do your own laundry and your own groceries and you live in an apartment. It's totally different from a vacation, and that's when you really get an experience that will enrich you. You realize that people may live differently, they may go about the work that they do differently, but it can be completely valid and it still works.

Professionally, I think it brings a bit of humility. You're not the arrogant person, and you're not the savior. You're there to learn. I was there to learn. It was at the beginning of my career, and I was there to learn, and I did.

I also think, personally, traveling and working overseas, working in totally different environments, helped me create a certain assertiveness and self-confidence as well. You have to deal with government offices, and they're not always the friendliest bunch, and you have to figure out how to get a visa and all that kind of stuff. Dealing with preconceived notions of people, like what Belgian people or French people think of a Québécoise, what I went in thinking of French and Belgian people or American people—travel breaks down

those barriers and whatever preconceived notions or prejudice that you may have.

I think, then, when you are a manager or when you're in higher education, you have students and colleagues from all walks of life who may come from elsewhere, and I think it just opens you up to more diversity and to . . . people in all their differences, their marvelous differences. I think it helps you when you're a manager.

You're very active in SLA. How long have you been a member of SLA, and what prompted you to join?

I believe I joined in 2000. I had moved to the United States; I worked at the University of Louisville, in Kentucky.

The Kentucky Chapter of SLA is a force to reckon with. They take you in and they don't let go, and they're very friendly. I went to a social event they held, it was a cocktail hour kind of thing in a bar. By the end of the night, I had volunteered myself to be the webmaster and newsletter co-editor. They didn't ask me, I volunteered. They got me, they got me!

That's where I started becoming more involved—first in the Kentucky chapter, for the webmaster and Awards Committee, those kinds of things, then on the board of the Sci-Tech Division, IT Division, Academic Division, the Florida and Caribbean Chapter, all the way to now being on the SLA Board of Directors, which is quite an honor and privilege. I think SLA served me and my career quite a bit, and it's my way of giving back.

That leads really well into my next question. You've taken on a variety of roles, everything from, as you mentioned, being in communications and newsletters and a webmaster to sitting on task forces and steering committees, and now you're on the SLA Board of Directors. Have any of these roles really influenced your career? Is there any particular experience that stands out?

I've definitely learned skills through SLA that I would not have the opportunity to learn in my regular work, at

Catherine (left) and some University of Wisconsin-La Crosse students enjoy a visit from a therapy dog, courtesy of the local Humane Society. The dogs visit during finals week to help relieve students' stress.

least not in the same time frame, not as quickly—things like leadership and delegation, and meeting management, and talking and presenting to large groups of people, and how to persuade people, strategic planning, those sorts of things. I think SLA helped me gain confidence in my skills and capabilities, which then made me prone to think, yes, I could be a director, yes, I could go in Florida and go to a campus where there's no library and start a library.

I'm a big fan, as a library director, of having my librarians be involved in professional associations because I know they are going to learn skills, and it's an investment in them and their careers. It's also an investment in my organization, because I think I'm going to have better librarians from that. I've really enjoyed being active at the chapter and division level, because you can go deeper into a role and you can try things—for example, I've never been an event planner, so I'm going to try that. It's a safe environment to do it.

I think being involved at the association level brings an awareness of the organization as a whole and all the parts working together, and it gives you a big picture. Last year, I joined the SLA Board; I'm in my second year now. It's been quite an adventure, because a lot has been going on with the association,

and resolve was needed, and decision and action. I think the board has achieved that.

I was on the Transition Committee last year. The Transition Committee was formed to determine what the leadership staff was going to look like after the executive officer had left. Were we going to hire a new person? Then the idea came to maybe look at AMCs, association management companies, and that's what we decided to go with. The Transition Committee did—I mean, it was a very important task, and we were super-efficient and on task and on timeline with, I believe, positive results. I think great things are going to come with our AMC. Probably that is the particular experience that stands out the most.

You've had a varied career—records management, then nonprofits and academia, plus the diverse roles you've performed in SLA. What's the most "outside the box" role you've ever taken on, either professionally or with SLA?

That's a tricky question; it's one I'm not sure I've found the answer to yet. Recently, I was a bird catcher. I mean, we have critters that come into the library. Often we have birds and bats, so one afternoon I was the only one left and a bird was trapped inside, so I had

to catch it. We have nets at the front, literally.

In the very early 2000s, I created one of the first subject- or discipline-specific blogs in librarianship, which was called EngLib. I was, at the time, in an engineering and science library, so I would just find information that would be useful in new publications, conferences, and job announcements, and I would publish them on my blog. Back then, blogs were very cool and advanced. I had a lot of fun with that, and I think it was actually useful to my colleagues in science librarianship.

You've been a library director for about a decade, first at the University of South Florida and now at the University of Wisconsin-La Crosse. What advice would you give librarians who are interested in moving into management or are just entering that area—transitioning, as you said, from a specialist to a manager?

Well, I think the first step—and I think it's good for any librarian or information professional, in fact—if you're interested in going in management, I think you have to start thinking beyond your immediate duties and your immediate unit, beyond your library or information center. Start to figure out the place and role of your unit related to your overall organization and your overall field, like higher education in my case. How does your unit fit, and how do you contribute to the overall mission and vision of your organization and in the field? So again, it's the bigger-picture-thinking kind of thing.

I see my role as a manager or director to provide, as much as possible, to my staff and my units, the tools and resources they need to succeed, and then to give my boss, which in my case is the provost, a successful unit that runs well and contributes to the overall mission of the organization. When my staff is successful and looks good, and when my boss looks good, then I look good. That's basically how I see my role as a manager.

Navigating Business Resources Using Concept Maps

A poster presented at SLA 2016 outlined efforts by an academic librarian to help students choose the most appropriate database to meet their information needs.

BY HAL KIRKWOOD, MSLIS

The Roland G. Parrish Library of Management & Economics at Purdue University provides access to approximately 100 business-related databases. These databases cover every facet of business information, including management, economics, international business, accounting, and entrepreneurship. Due to the large number of databases, the similarities in their content, and their uninformative names, library staff are constantly challenged to direct students to the database that is most appropriate for their needs.

To assist students in selecting databases, we, along with staff at many other libraries, have created numerous guides and resource pages using LibGuides and similar tools. These pages consist of lists of resources, often with a brief descriptive sentence or two that will (we hope) provide enough information for students to select the appropriate database. Anecdotal evidence seems to show, however, that students are overwhelmed by these lists and still unsure about making the correct choice to find the information they need. This often causes them to default to either known databases that may be inappropriate for their purposes or to Google to acquire some possibly relevant items.

In response to this problem, I started a project to create an alternative method for selecting databases. My goal is to create a tool that more effectively guides students toward the "right" database, with *right* being defined as a resource that will more likely contain quality information relevant to a given topic or information need.

While contemplating the challenge of choosing a database from a student's perspective, I decided that creating concept maps (also known as decision maps) would be a possible solution. I have some background with concepts maps, having used concept mapping in the credit-level courses I teach for individual exploration and understanding of specific topics. The crucial aspect was to design the maps so they would provide students with appropriate choices for their anticipated information needs. Thus, throughout the process of designing each map, I kept asking, "What will the student be looking for?" and tried to describe the selections in language the students would likely use.

I evaluated several concept mapping tools before selecting SpicyNodes. There are close to a dozen different web-based mapping tools available, all with a variety of features and functionality. I chose SpicyNodes because of its visually appealing look and feel as well as its underlying infrastructure of link management.

Within SpicyNodes, it's possible to create a fluid, moving concept map that opens and closes as a user navigates across it. It is also one of the few concept mapping tools that allows a map to link to itself. This was especially useful for resources that cover multiple subjects. (Initially, concept maps were created for business information broadly covering companies, industries, and business articles. It quickly became apparent that this would develop into an extremely large map, so segmented maps are being created with the goal of linking them together.)

No formal assessment has been conducted on the maps, as only a couple of them have gone fully live to the public as of this writing. I hope to roll out several more before the start of the fall semester and identify an informative method of assessing their impact. Anecdotally, the response to the maps has been positive, especially from non-business students who are less familiar with business databases. (For example, Parrish Library staff visit several mechanical engineering design classes whose students are required to conduct basic market research, and we work with engineering students who are involved in a community program to assist local small businesses in solving problems. Many of these students have commented on the helpfulness of the maps that are available.)

An unanticipated benefit of the maps is that they have proven to be very effective in training the student assistants who staff our information/reference desk. The students are assigned to explore and use the maps as part of their training so they become more familiar with our resources and better understand what students are likely to

HAL KIRKWOOD is an associate professor of library science in the Roland G. Parrish Library of Management & Economics at Purdue University. He has been awarded the Purdue Libraries Excellence in Teaching Award and is the only Purdue librarian to be inducted into Purdue University's Book of Great Teachers. He can be reached at kirkwood@purdue.edu.

be seeking when they come to us for assistance.

There are several issues I will need to address as this project moves forward. For example, I will need to ensure the maps are kept up to date as databases are dropped from, or added to, our collection. Another issue is the possibility of SpicyNodes shutting down. I've received some information hinting that this may happen in the relatively near future, so I am already evaluating several alternative concept mapping tools.

LucidChart, Cmap, and Bubbl.us are the leading alternatives.

Overall, this has been a very interesting project to work on and has greatly improved my conceptual understanding of business information. With additional student feedback, I hope to develop a clearer understanding of how students seek out information and use that knowledge to guide them to appropriate databases. **SLA**

Hal Kirkwood's poster on concept maps, which he presented at the SLA 2016 Annual Conference.

Providing Google Workshops to Science and Social Sciences Students

An SLA 2016 poster presentation highlighted the value of teaching science and social sciences students about Google products and discussed the workshops' future directions.

BY KAYLEIGH AYN BOHÉMEIER, MLIS, AND MELANIE MAKSIN, MLIS

The Center for Science and Social Science Information (CSSSI) is the Yale University Library hub for sciences and social sciences at our institution. Graduate students in the sciences and social sciences frequently outnumber undergraduates, and librarians at CSSSI strive to provide relevant workshops to each of our constituencies to improve their experience of library resources.

In 2012, we began teaching students about Google search products. We decided to offer Google workshops after many of us participated in the "Power Searching with Google" MOOC, which gave us an inside look at how engineers at Google intended to have their search engine used. And within the broader library environment, we were aware of librarians (Little 2011; Dewan 2012; Potter 2008) who have argued for understanding Google Scholar as an information tool.

During the course of our workshop planning, we conducted research on Google's acceptance among student constituencies (Cothran 2011) and gathered additional perspectives from individuals who saw mainstream information-gathering practices as an opportunity to argue for library resources'

value (Leibiger 2011). In our workshop program, we included sessions on Google Scholar, Google Images, Google News, and basic Google. We hoped to teach attendees how to successfully use Google products as a complement to library resources.

We marketed the workshops by adding promotional slides to library display screens, sending e-mails to departments from subject liaisons, using department and library listservs, and adding workshop information to our LibCal-based Library Instruction Calendar. Figure 1 shows our attendance statistics over time. The initial workshops often attracted no attendees because we were still exploring the most effective ways to market them and trying to identify what the students wanted from them.

Over the past four years, workshop successes and failures have narrowed our offerings to the following: Google Scholar for Advanced Researchers, Finding & Using Images for Scientists and Social Scientists,[1] and Google (Like a) Scholar for Undergraduates. We also offer occasional workshops for librarians and staff to refresh their Google expertise; for the librarian-oriented workshops, we add a meta-layer in

which we describe how we teach the content to students.

Key moments for us were (1) engaging with faculty about Google Scholar and (2) integrating the use of Google Trends into our Google Scholar for Advanced Researchers workshop. Many faculty are surprised to learn that librarians have expertise in using Google Scholar, a fact they discover during discussions about article access troubleshooting. In our workshop instructions to students and discussions with individual faculty, we have emphasized this troubleshooting expertise and the need to use Yale resources to verify access to items discovered through Google searches.

Google Trends is a product that allows a searcher to see trends over time in the way people search. For example, we can teach students about terminology evolution in the sciences by using a contemporary case study of exoplanets (see Figure 2). Searching for just *exoplanets* eliminates many important works from Google Scholar's results that date back to before the 2009 launch of the Kepler space laboratory, whose travels have popularized the term *exoplanet* over the previously used *extrasolar planet*.

Another key moment occurred this summer, during the Yale Young Global Scholars program (which took place after the SLA 2016 poster session). Several months previously, librarians in the Yale University Library had heard Safiya Noble speak about programming biases in Google's algorithms (Noble

KAYLEIGH AYN BOHÉMIER is the science research support librarian for astronomy, geology and geophysics, and physics at the Center for Science and Social Science Information at Yale University. She has published profiles of physics Nobel prize winners with Science and Technology Libraries and is interested in research metrics, instruction and teaching, and embedded librarianship. She can be reached at kayleigh.bohemeier@yale.edu. **MELANIE MAKSIN** is the director of research support and outreach programs at the Center for Science and Social Science Information at Yale University. She has published and presented on topics related to government information instruction and constructivist pedagogy in academic reference services. She is working on an MA in higher and post-secondary education at Teachers College, Columbia University.

2016). We used that information to integrate discussions about algorithmic biases into our workshops to give students a sense of when it may be appropriate to begin their research with library resources and what Google leaves out due to its page rankings (e.g., when seeking the correct institutional access links for *Scientific American*, the basic Google search will go to the paywalls on the public-facing website). This change in the workshop content was very well received.

We constantly collect anonymous feedback from attendees to assess our workshops' effectiveness. We ask whether the session was helpful, what information the attendees found most valuable, and what information they would still like to learn. Their feedback has helped inform not only workshop content but also our workshop roster.

For example, students have told us they appreciate information about operators and explanations of how Google

ranks results, but they often say they would like (1) more examples of how to use Google Scholar in conjunction with databases and (2) more practice time (and refreshments). Many attendees do not realize how differently Google operates from a library database, so the workshops provide us with a tremendous opportunity to highlight their similarities and where those commonalities break down. Feedback such as this enriches the attendance statistics we collect.

As shown in Figure 1, the majority of our workshop attendees sign up for the Google Scholar for Advanced Researchers workshop. Google (Like a) Scholar for Undergraduates has seen persistently lower attendance, so for the coming year, we will experiment with renaming the workshop "Advanced Google Scholar in 30 Minutes." It's possible that everyone believes they already are an advanced searcher!

We have also branched out into new

topic areas, although we still frame our workshops as opportunities to get more from Google. We use Google as a point of entry into conversations about free versus licensed content, how Google does (or doesn't) understand what we can access through aggregators, scholarly communication, copyright, data quality in Google, and why some Google search strategies don't translate well to library research.

The process of designing and implementing workshops has been iterative, and there is no perfect session sequence. Even within sessions, Google update releases can lead (and have led!) to last-minute shifts in how we plan to teach the content. As with teaching most skill sets, we need to continue to adapt and engage with our users to continue meeting their needs. **SLA**

Notes

1. For more information about our Google images workshops, please read our chapter, Better
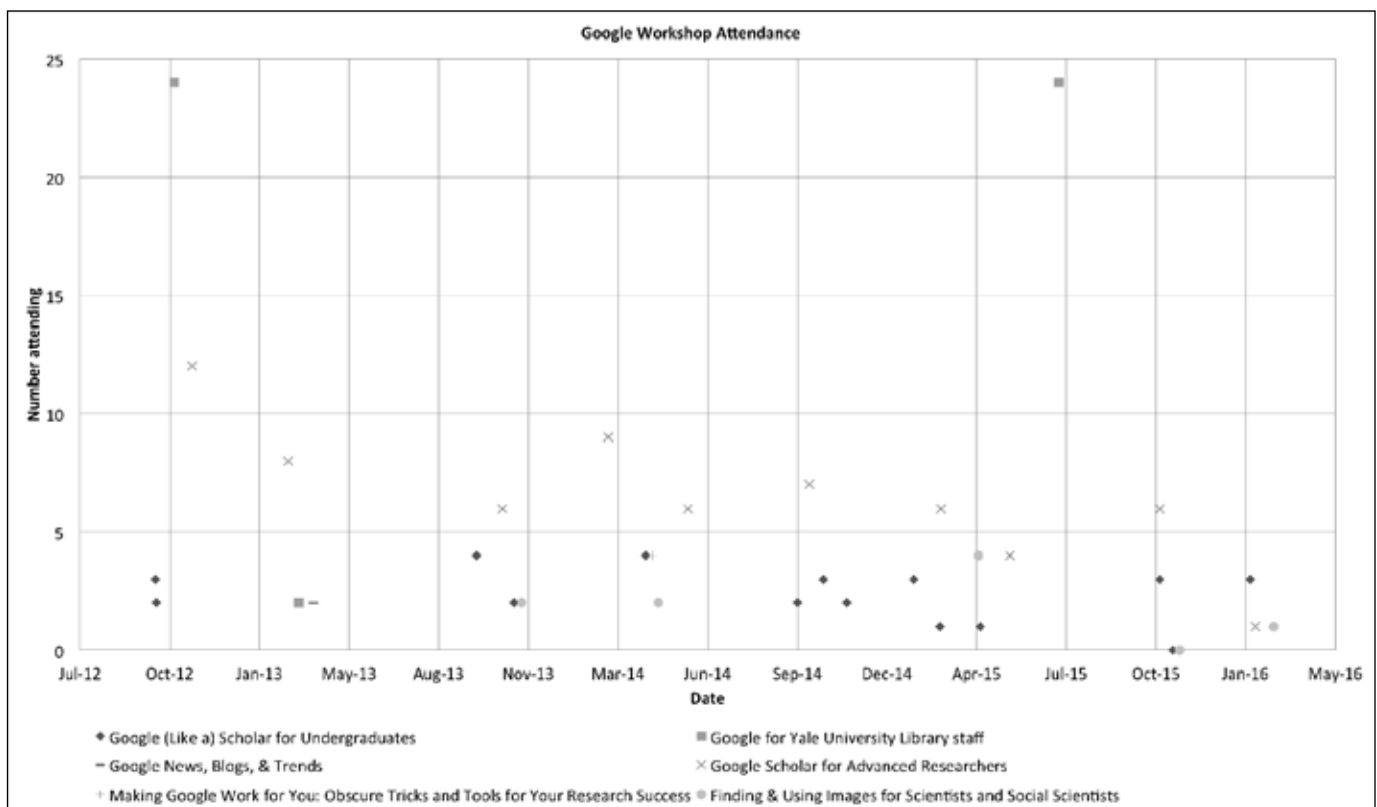
Figure 1: Google workshop attendance statistics from July 2012 to the present. It's important to note that local library policies about unattended workshops changed in LibAnalytics. Thus, the data prior to June 2014 shows successfully taught workshops, and the data after June 2014 includes both successful and unsuccessful workshop instances.

Images, Better Searchers: Google Images and Visual Literacy in the Sciences and Social Sciences, in *The Complete Guide to Using Google in Libraries, Vol. II: Research, User Applications, and Networking* (pp. 79-88).

References

Cothran, T. 2011. Google Scholar acceptance and use among graduate students: A quantitative study. *Library Information Science Research*, 33(4), 293–301. doi:10.1016/j.lisr.2011.02.001

Dewan, P. 2012. Making the most of Google Scholar in academic libraries. *Feliciter*, 58, 41–42.

Leibiger, C. 2011. Google reigns triumphant?: Stemming the tide of Googlitis via collabora-tive, situated information literacy instruction. *Behavioral & Social Sciences Librarian*, 30(4), 187–222. doi:10.1080/01639269.2011.628886

Little, G. 2011. How I learned to stop worrying and love Google. *The Journal of Academic Librarianship*, 37(5), 443–444.

Maksin, M., and K. Bohémier. 2015. Better images, better searchers: Google Images and visual literacy in the sciences and social sciences. In C. Smallwood (ed.), *The Complete Guide to Using Google in Libraries: Research, User Applications, and Networking* (pp. 79–88). Lanham, Md.: Rowman & Littlefield Publishers.

Noble, S. 2016. The Intersectional Internet: Toward an Ethic of Social Justice on the Web [lecture]. New Haven, Conn.: Yale University.

Potter, C. 2008. Standing on the shoulders of libraries: A holistic and rhetorical approach to teaching Google Scholar. *Journal of Library Administration*, 47(1), 5–28. doi:10.1080/01930820802110563
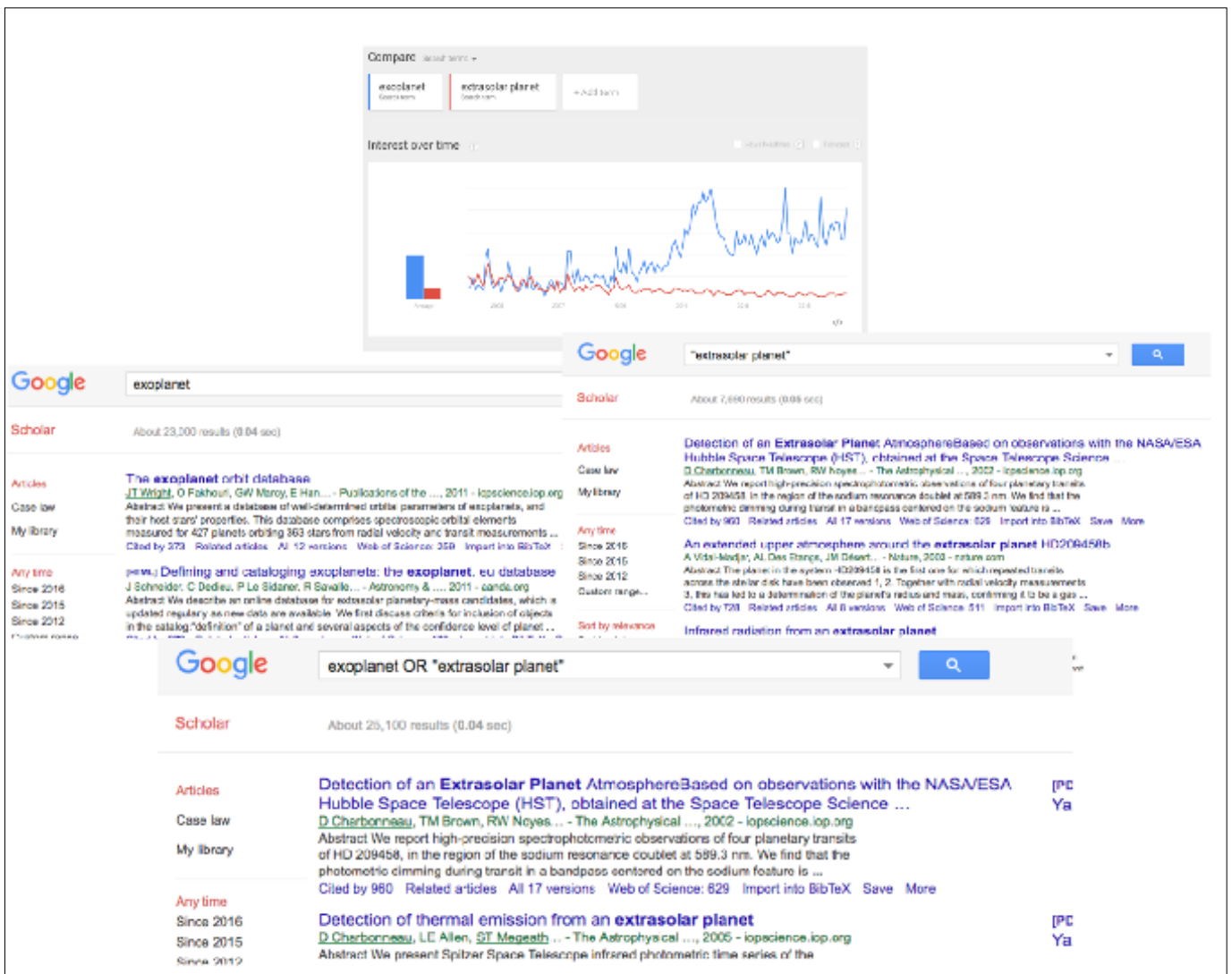
Figure 2: Google Trends (top) and two different searches, one on *exoplanet* and the other on *extrasolar planet*, can highlight what happens when terminology changes in a field. It is also excellent for showing students the OR Boolean operator.

Providing Effective Service at a Distance

There are now free tools available that provide easy sharing of screens, some shared whiteboard spaces, and other collaboration options without special software or dedicated user accounts.

BY DAVID STERN, MLS

Information is ubiquitous, but that does not mean specific items are easily found or handled. Assistance with information may be required at any time and in any place to satisfy immediate needs. Information professionals must be available at the point of need to serve their customers, so they must be comfortable using remote support tools and techniques.

Remote support options can be made even more effective through the use of free or fee-based "shared screen" and collaborative technologies. These synchronous communication tools allow people to spontaneously view desktops in remote mode and collaborate at a distance without using a shared technology platform and without requiring individual login accounts.

For example, many SLA members are familiar with the GoToMeeting and GoToWebinar networking tools. We generally use these tools to push content (typically Webinars) to viewers, often using static PowerPoint screens with voice accompaniment. In most cases we offer the "sidebar chat" as the interactive option.

Some SLA members may have seen these programs used in a slightly more enhanced way, as conferencing tools for a few simultaneous participants.

This approach often causes frustration when expanded to a larger-scale group, as the technology does not always provide (or is not utilized correctly to provide) effective communication and support for sophisticated multimedia group work. While these conferencing tools can be used for certain types of group work, there are other kinds of collaboration options we should explore.

Trial and Error

Some communities use software that offers a few of the features we are seeking. SharePoint, the popular enterprise knowledge management tool, contains powerful collaboration space features, but remote screen sharing is not a smoothly integrated part of the product. Elluminate and other teaching platforms (e.g., Blackboard, WebCT, and CANVAS) found in educational settings offer teaching and conferencing environments with collaboration spaces, but these tools are hosted behind an organizational firewall that requires passwords and accounts. Like GoToMeeting, they have the ability to "push" screens and allow different people to share their screens. Mastering the functionality of these tools requires some trial and error.

Within the library community, OCLC's QuestionPoint virtual reference management tool used to offer remote desktop sharing, but this feature was not always reliable, especially with third-party interfaces. The remote screen sharing aspect has been removed, and the service now focuses on a 24/7 "reference cooperative" approach using chat functionality.

Google Hangouts provides spaces for effective conferencing and collaborative group work using a variety of installable applications, and the screen sharing options allow you to push information between users. However, all parties using Google Hangouts must have Google accounts. This is generally not a problem for internal projects (unless there are other security issues), but it is not convenient for random and cross-organizational cooperation.

There are now a few free tools that provide easy sharing of screens, some shared whiteboard spaces (if your pushed screen accommodates such functionality), and other collaboration options without special software or dedicated user accounts. There are often seat limits for free accounts, but some services offer special educational options and/or discounts if you create accounts, and some provide additional free options if you create accounts and load proprietary software onto the host workstation.

Join.me (https://www.join.me/) offers free screen sharing, unlimited audio, and "ridiculously simple" video conferencing with no registration requirement. The conference or work group host will be asked to download a one-time binary file and create a free account; collaborators will not need to download any software to participate. Once an account is created, an app allows the host to invite others to share their screen and open either Webinar or chat channels.

The free account provides for ten meeting participants, five video feeds, screen sharing, and Internet calling. You can purchase extended service, which allows you to pass the presenter role to others. With the free service,

DAVID STERN is library director at Saint Xavier University in Chicago. He can be reached at hdavid.stern@gmail.com.

Managing relationships and managing people, I think, are a big part of being a boss. There's very little training, though, that can completely prepare you to do that. It's just easier to learn how to make a budget or follow your budget or that sort of thing than managing people. I think having a vision and being at ease with strategic planning—that's another skill that is needed when you're a manager.

When it comes to managing people, I think that respect and modeling and then finding what motivates people are important, and it's not always money. It's rarely money. Typically it's something else that motivates people, so if you find that thing, it will help people be happier at work.

Were you able to use any SLA resources to help you transition to management—anything you might recommend to others?

What helped me is my network of colleagues that I've made through SLA, who have gone down the path before me and become managers. I can e-mail them, I can make a phone call, I can talk to them at the conference about challenges—that sort of thing.

What challenges have you faced as a library director? How have they differed from challenges you encountered, for example, as an electronic resources librarian?

Some challenges were, maybe—I don't want to say they were more important, because when you're an electronic resource librarian you have some definite and important challenges, for example, budget cuts or negotiating the best deal with a vendor. I think the challenge you face at the manager or director level is that you have to make sure you have that big picture. You don't need to know all the details of everybody's job, but you need to know what each is doing and how they relate to each other. You have to be prioritizing, planning ahead, strategic planning, wondering what you can do to meet the goals of the library. And then those

goals, of course, have to meet the needs of your bigger organization. I think these would be the challenges.

In higher education, we have to deal a lot with budget cuts and the ever-rising prices of resources. That's where prioritizing and strategizing are important. Of course, when you are an administrator, a director, you have to deal with a certain amount of office politics. You have to make sure that you communicate the value of your unit to the rest of the organization and that you can advocate properly for resources.

You speak French and English. Do you have any tips for information professionals who might want to become proficient in another language?

I married an American, but that may not be advice that would work for everyone. Actually, immersion is the best way of learning a second language. When you don't have the choice of speaking the other language, that helps you learn it quite rapidly. I'm a native French speaker. I'm from Canada, so I learned English, the other official language, at a fairly young age in school, and I had schooling throughout high school in English. I also watched a lot of American shows and movies. When I moved to the States, my comprehension, my reading level, was excellent. My speaking was not up to par, I didn't speak English that well or that often, but immersion then worked its magic.

I think in the U.S., having a second language is definitely a plus. It's a plus in higher ed. It gives you access to more published research, for one thing. I don't use French regularly at work, but sometimes I've had people ask me to translate documentation or invoices or things like that. In Florida, my campus was trying to create relationships with universities in France, so I would have people call me and say, "I need to talk to so and so in France. How do I pronounce their names?" I would do recordings. I think it just opens you up to other cultures, speaking another language. It can only be beneficial.

Now for the fun question to wrap up. What do you enjoy doing when you're not in the library?

I enjoy playing pub trivia, in which librarianship, bilingualism, and having traveled help quite a bit. My husband is still better than me. We play together on the same team.

I enjoy walking. I enjoy movies. I'm finding myself with an increased interest in gardening. We bought our house last year and I'm getting more interested in gardening, although I don't know what I'm doing at all. I'll look at plants while I walk through the neighborhood—see what other people have done, what sort of trees and plants they have. I will kill any indoor plants that I have; outside plants have a better chance of making it with me. I do enjoy this. **SLA**

Catherine (second from right) poses with the other members of the 2014 class of SLA Fellows: from left, Tony Landolt, Leslie Reynolds, Mary Ellen Bates, and Daniel Lee.

Making Information and Knowledge Easy to Find and Use

By organizing information assets and making them more accessible, special librarians can foster the development of policies that support their organization's mission and goals.

BY JAYE A.H. LAPACHET, MLIS

In April, the SLA Board of Directors approved a revised set of competencies for information professionals. These revisions, developed by a task force headed by David Shumaker, resulted from extensive discussions about the knowledge and skills needed by 21st-century information professionals to remain relevant to their organizations.

One of the primary goals of this process was to encourage the use of the competencies by information professionals as well as by C-level executives, academic faculty in universities, human resources professionals, and a wide variety of others. In its discussions of knowledge management, content management, and information search and retrieval, the competencies document makes clear that it is designed to be used beyond the library and information center to help foster an understanding of, and the development and maintenance of, knowledge and content management policies that support the organization's overall mission and objectives.

In adding information organization and management as a competency in this revision, the task force did not intend to diminish or disregard the

value of traditional information skills such as cataloging. On the contrary, we wanted to highlight them. Cataloging and other technical services have been included in the competencies in some form for a long time, and the task force retained them while making sure they are understood to be relevant to more information-centric positions.

Additionally, the language and skills described in the information management section of the competencies document clearly support the continued creation of information and knowledge. In any organization, regardless of type, information and knowledge are valuable assets and should be treated, maintained, and used as such.

Spreading the Wealth

The information organization competency (titled "Organization of Data, Information, and Knowledge Assets") covers the organization, preservation, and retention of assets over a defined life span; it also discusses making those assets findable while taking into account the mission and operational needs of the organization. This competency lays out a framework for creating a foundation for the excellent management of data,

information, and knowledge assets. It clearly defines the roles of knowledge managers, librarians, content managers, and other information professionals in establishing the requirements and procedures for metadata development and application. It also includes skills in evaluating and adapting industry standards for classification and categorization systems, storage and preservation, location, and connectivity to ensure that assets are properly managed.

The accumulation and organization of valuable information has gone far beyond purchasing magazines and books and shelving them in a library. The crux of the matter is that if data, information, or knowledge assets cannot be located and reused, they constitute an added, unnecessary cost. All information needs to be organized so it can be found quickly and easily by the average worker. Findability minimizes the costs of re-creating or rewriting content and provides better value over the lifespan of an organization.

This competency also takes into account the changing business environment and expands on the foundation of traditional cataloging by requiring the ability to develop custom metadata schemas and custom taxonomies and ontologies as local circumstances and subject matter warrant. Taking organizational circumstances into account is critical in making the information professional's practice relevant and useful.

An additional aspect of this competency is its embrace of "spreading the wealth." We, as information managers, cannot hold information captive in our libraries and information centers, nor should we want to act as gatekeepers. The more information we make available and findable, the more often it will be used for organizational business.

It is critical that we train others in effective practices for information organization and management, because

JAYE LAPACHET is the owner of J8 Consulting in San Francisco. She has set up databases and workflow systems in numerous organizations and is an expert in identifying ways to streamline work flows. Her projects have included a variety of technology implementations, training programs, and departmental reorganizations. She can be reached at jlapac@gmail.com.

content management starts at the point where a user chooses to save a document. A trained and qualified information professional can teach others about metadata application at the desktop level, so the foundation of the content management plan can start where the information is being created. It is also important for information professionals to provide high-quality, relevant tools to ease findability and ongoing access.

"Spreading the wealth" through training and collaborating in the implementation of systems and customized metadata has always been an integral part of the information professional's work. The Competencies Task Force codified training others in effective practices for information organization and management in the new document.

Taking Pre-emptive Measures

The value of the competencies document in general and of the information organization competency in particular can be seen in the way that most organizations treat their information assets. Regardless of their mission, organizations generate information every day— e-mails, patent plans and forms, agreements with distributors and buyers, marketing materials, briefs, research findings, business development plans, and so on. Companies merge and acquire each other all the time simply to expand their base of these and other types of intellectual property. Patents and copyrights are valuable information assets, and if they are not organized or can't be accessed and found, their value can diminish.

Companies have furniture, software, and other tangible assets, which are carefully inventoried, counted, and maintained. Facilities departments manage buildings so that the staff have a place to work. Human resources departments manage the health and welfare of employees, helping to ensure that the work of the company gets done. Yet many companies organize their information only as required by law or when a problem arises, even though putting pre-emptive measures in place to provide access to information quickly

and efficiently would save money in the long run.

Granted, assigning values to vacation policies on the corporate intranet, engineering drawings on a CAD server, briefs and pleadings on shared drives, and meeting notes on Sharepoint servers is difficult. Such a step is generally not even considered until an organization contemplates a major change or confronts a problem. Developing and implementing information organization and management practices early on saves money by saving time and minimizes stress by preventing problems.

All organizational information has value, because it communicates something about the product or business and can be reused. This is just as true in nonprofit organizations as in for-profit organizations. For example, academic organizations have cultural and historical assets, some of priceless research value. Universities have business interests, too, including technology transferral and licensing intellectual property. The information management competency assists librarians in tapping into these assets and interests and facilitating related information goals by managing content and knowledge.

The rise of powerful search engines has not obviated the need for information organization and management. In fact, the proliferation of technology has highlighted the need for people to take charge of company information and organize it. Providing the groundwork (such as customized metadata schema) for targeted search tools contributes to the overall success of the organization.

For example, many tech companies started in an informal and friendly way and saved their materials on Box or DropBox or Google Drive (or all of them). As the companies have grown, this practice has continued to the point where the materials are so scattered that they are difficult or impossible to find. Along the way, some people have left these organizations and taken their knowledge with them, adding another layer of chaos. Finding an answer to a simple question, such as "How many hours of vacation do I accrue every

year," has become a Herculean effort.

The life cycle of information is also important. People generally want the most up-to-date vacation policy, not the policy from ten years ago. Thus, developing retention and destruction policies and procedures based on legal requirements and on organizational and operational needs is critical, and these roles are included in the competency. Part of the life cycle management of information includes applying quality control practices to ensure the appropriate application of policies and practices for information organization and management.

In many organizations, information is undervalued and undermanaged until problems arise. Information professionals are in the best position, because of their special training and experience, to recognize potential problems and either avert or correct them. Organizations with trained, experienced, and innovative enterprise content managers and information professionals will be more valuable and better positioned to succeed in today's ever-changing information environment. **SLA**

Creating Copyright-Savvy Slide Presentations

Using content and images in slide presentations poses the same risks as using them in other materials. Follow these best practices to protect yourself and your organization.

BY LESLEY ELLEN HARRIS

Have you ever attended presentations accompanied by slides that made you wonder about, or even wince at, the copyright risks they posed?

People who otherwise are attentive to copyright management issues and wouldn't dream of publishing someone else's article without permission in a company newsletter often create slide presentations with scant attention to copyright protocols. Is copyright not on their radar screen? Are they assuming a fair use application?

How do you handle, copyright-wise, the use of images in your organization's presentations? And what advice do you give others with whom you work?

This column will discuss best copyright practices for slide presentations to enhance your understanding of the copyright issues inherent in them. It will also help you educate others in your organization and guide them when they are creating their slides.

Assume that copyright applies. As with most copyright issues, the matter of appropriate usage for slide presentations is nuanced, and the answer to many questions is the ever-popular (in copyright parlance) "it depends." Some of the factors to consider are the sources of the content and images, who created them, and whether they're licensed for some or all uses. Always assume that any image or other work you find online or elsewhere is protected by copyright and that you must seek permission to use it.

If you ascertain that copyright in a work has expired and the work is in though the underlying work is in the public domain.

Use just the facts (and data). You can state facts and news and describe historical events as long as you don't reproduce them exactly as you found them in the source material. You can also summarize facts, historical information, and the like without obtaining permission. It is best practice to use data or summarize it rather than reproduce, adapt, or share the source table or chart without permission.

Limit the amount of material you use. Generally, the use of small portions of a work is acceptable. Examples of small portions are a short quotation and a thumbnail print of an image.

> **Know the terms of licenses and assignments (i.e., permissions), and if they don't apply to the current situation, either seek additional permission or use an alternative.**

the public domain (because, say, the author died more than 70 years ago for U.S. purposes or more than 50 years ago for Canadian purposes), you can use the work without obtaining permission. However, if the work has been manipulated and would constitute a new work, that new work may have a new and longer copyright duration and may be protected by copyright, even

Consider the Alternatives

Instead of using content and images from other sources in your slides, consider these alternatives:

Link to the source. If the work is copyright-protected or you're not sure, you can link to a legitimate source of it. Linking to the original source of the work (the creator's or copyright owner's website) poses the lowest risk, as opposed to linking to another site where it may have been used without permission (in other words, don't support piracy and other forms of copyright violation!).

Describe the content or image. You can describe an image or provide a brief synopsis of an article instead of including the work in your presentation.

Create your own content. Can you use a chart created by a fellow employee (and in which your employer owns the

LESLEY ELLEN HARRIS is a copyright lawyer, author, and educator as well as the founder and publisher of the copyright resource site Copyrightlaws.com, which explains copyright law in plain English. Visit Copyrightlaws.com to subscribe to Lesley's weekly copyright e-letter.

copyright) that displays the data you need? Can you take your own photograph of the tourist attraction you want to feature in your presentation, keeping in mind that if this is done for work purposes and taken in the course of your employment duties, your company could own the copyright in it?

Use a stock photo agency. Your organization may have an account with a stock photo agency, where you can find images that suit your purpose. Make sure you read the license (which might limit how the image is used) and follow the terms and conditions of this agreement with the agency.

Apply a Creative Commons license. If the work is covered by a Creative Commons license and your use is in accordance with its terms, you can use it. However, be sure to read the license. Not all CC licenses are created equally, and there are restrictions even on CC-licensed content.

Prior Permission, Fair Use, and Fair Dealing

Just because a copyright owner grants you permission to include her photograph of a glorious sunset in a one-time employee stress reduction training session at your company's headquarters in Toronto doesn't mean you can use that photo in a public presentation being made across North America to entice vacationers to your company's newest resort. Know the terms of licenses and assignments (i.e., permissions), and if they don't apply to the current situation, either seek additional permission or use an alternative.

Re-coloring images, cropping images, changing black and white images to color, or otherwise manipulating or "morphing" them cannot be done without the copyright holder's permission.

If you find a copyright-protected work that you want to reproduce in your slide presentation and are unable or unwilling to seek permission to use it, you could employ the fair use (United States) or fair dealing (Canada) provisions. Under these provisions, you may be able to reproduce a work without permission in some situations, but only if the presentation will be used solely in the U.S. or Canada.

Fair use and fair dealing are not without risk. There are varying levels of analysis involved, and the only way to know for certain if your assessment is correct is in a court of law. It is wise to know your organization's risk tolerance for a failed fair use or fair dealing determination; it is also advisable to consult internal policy, a copyright specialist, and/or legal counsel.

Familiarize Yourself with Copyright Basics

Everyone in your organization needs to be familiar with the basics of copyright. Whether you're designing presentations, writing the company newsletter, or photocopying materials, you can benefit from taking copyright courses and learning when and where to seek guidance. **SLA**

Info Tech

you can perform remote training and remote reference; with the fee-based options, you can create a more powerful shared experience, including fully shared screens on both ends.

Screenleap (http://www.screenleap.com/) enables you to share your screen with what it calls "frictionless collaboration." Using the website without an account allows you to share your screen for 30 minutes, with a maximum of 2 viewers. A free host account, which requires a one-time download of a tool, provides 1-2 hours of service per day for up to eight viewers but no conferencing, no scheduling, and no encryption. Collaborators do not need to download any software to participate.

You can buy extended basic service, which provides eight hours/day for up to 30 viewers as well as audio conferencing, but no scheduling or encryption (which is provided by the Pro and Company options). The scheduling tool allows the host to invite others to view his or her screen. There is no associated webinar or chat functionality, so you would need to maintain a separate connection for these communication options if you do not keep Skype or another tool open. With the free service, you can perform remote training and remote reference.

Join.me and Screenleap can provide effective (and free) virtual support at a distance. They also allow for a basic level of shared, collaborative work, although they may not scale up to create effective, dynamic large-group scenarios. Try them and see when and how they can enhance your remote service options.

For additional information on how libraries might use these remote support tools, see my article titled "Virtual Reference and In-depth Assistance Using Shared Workspaces" in the January-February 2013 issue of *Online Searcher*. **SLA**