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THE MAGAZINE OF THE SPECIAL LIBRARIES ASSOCIATION

UNDERSTANDING THE BUSINESS DRIVERS

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THE MAGAZINE OF THE SPECIAL LIBRARIES ASSOCIATION

Understanding the Business Drivers

Librarians and information professionals who track their organization's goals and align their services accordingly will be in better position to communicate their value.

BY STUART HALES

It's 6:00 a.m. Do you know what your company's vision and goals are?

If you're the CEO, of course you know—you're the one who sets them, either alone or in conjunction with your board of directors and/or senior management. But if you're a librarian at a law firm or a senior researcher at a chemical company, odds are that when you wake up each morning, you have no idea what's driving your organization or where it's headed.

A study conducted by researchers in Australia details the extent of the average employee's lack of awareness. When asked to identify their employer's chief strategy from among six choices, only three in ten employees at 20 leading Australian corporations answered correctly (*Harvard Business Review* 2013). This misalignment with corporate strategy translates into missed opportunities, slow responses to crises, and a host of other problems.

For librarians and information professionals, it can mean something much worse—irrelevance. That's the message conveyed by a senior manager in a risk management firm who was asked to describe the role that special librarians play in modern business organizations.

"The classic view of a knowledge manager," he said, "is that they have insufficient knowledge on issues concerning clients and they are therefore not in the ball game." (*Evolving Value* 2013)

That sentiment—that librarians and info pros are "not in the ball game"—is shared by many executives and other users of information services. A 2013 report by SLA and the *Financial Times* found, for example, that only one-third of executives and information users in law firms and in educational and academic settings felt that information professionals added "a lot of value" to their organizations. Among government executives, the proportion was even worse—just 14 percent.

The report authors concluded that information professionals need to transition from their traditional role of inward-looking technical expert to a more outward-facing persona, which it called "client-centric decision enabler." This modern information professional, the report stated, would be characterized by five "essential attributes" that would enable him or her to add real value to the organization by furthering its strategic goals. These essential attributes are as follows:

1) Communicate your value.
2) Understand the drivers.
3) Manage the process.
4) Keep up on technical skills.
5) Provide decision-ready information.

This issue of *Information Outlook* explores the second attribute—understand the drivers—from the perspective of both academic librarians and their counterparts in business settings. In one article, Phil Faust, vice president of academic products at Gale, notes that academic librarians are beginning to play a greater role in two areas that are driving university decision making and goal setting—enhancing digital scholarship efforts and helping make college more affordable.

"It's difficult to nail down a universally accepted definition of digital scholarship, but in the most general sense, it's the use of technology to aid in humanistic inquiry," he writes. "Whether you are a champion or critic of digital scholarship, one thing you can't deny is that it is attracting interest, both from university officials and leading organizations outside of higher education. With this interest have come increased opportunities for research funds as well as recognition for schools. Universities need to remain competitive in the market for students, and winning prestigious grants is certainly one way to stand out."

Alexander van Boetzelaer, managing director of global research and development solutions at Elsevier, emphasizes that businesses are always rethinking their goals in light of changing market conditions, so librarians must constantly keep abreast of organizational priorities. He recommends several strategies for staying current on drivers:

- Regularly explore your organization's website.
- Read your company's marketing and financial communications.

Continued on page 17

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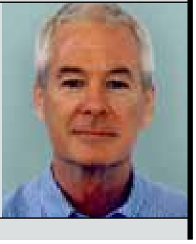

CONFERENCE REGISTRATION · VOLUNTEER OPPORTUNITIES

Registration Opens for SLA 2017 in Phoenix

SLA's 2017 Annual Conference in Phoenix will feature not just a new venue—the conference will be SLA's first in Arizona—but new ways for attendees to learn, network, relax, and even register.

Registration for the conference opened on December 5 and will remain open until the conference starts on June 16. This marks a departure from previous years, when conference registration opened in late November or early December, closed in January, then reopened in February.

A message announcing the opening of registration noted several other changes from previous conferences, including the following:

Session levels and learning streams. Educational sessions will be categorized according to three levels—fundamental, intermediate, and master class. Additionally, because the content from one conference session frequently overlaps with and/or relates to content from other sessions, sessions are being "mapped" (where possible) to themes, called learning streams. Five learning streams have been identified for SLA 2017: (1) career development, (2) data management and curation, (3) intellectual property, (4) leadership, and (5) metrics, analytics, and assessment.

Continuity and collective experience. To foster a sense of continuity, SLA 2017 will feature not only the traditional opening session on Sunday and closing session on Tuesday, but a general session on Monday as well. Each general session will be open to all conference attendees (including exhibitors) and will be scheduled so that the maximum number of people can attend, thereby ensuring that all attendees can share in the collective conference experience.

Community engagement. SLA 2017 will debut two new community-building concepts, Main Street USA and The Park. Main Street SLA will serve as the conference's hub—it will be a place for attendees to build connections, exchange ideas, and learn more about SLA and its community and units. The Park will be a recreation area where attendees can put their feet up and chat with other attendees, or release their emotions and clear their minds.

Health and wellness. Attendees looking to recharge their bodies as well as their minds will be able to participate in wellness activities such as yoga.

Streamlined floor plan and schedule. The physical distance between meeting rooms, keynote auditoriums, the INFO-EXPO hall, and other activity locations will be shorter than at previous conferences, making it easier to attend multiple events. SLA 2017 will also incorporate several dedicated no-conflict times into the schedule to ensure attendees don't miss out on educational sessions when they visit the INFO-EXPO (and vice-versa).

Another welcome change at SA 2017 will be the housing prices. Room rates at the three hotels in the SLA housing block start at $114, less than half the price of rooms in Philadelphia (site of SLA 2016) and Boston (site of SLA 2015). Each hotel in the housing block is providing complimentary in-room Internet service to attendees.

Early bird registration rates are available through 15 March 2017. For more information, visit http://www.sla.org/attend/sla-2017-annual-conference/.

Short-term and Intermittent Volunteer Opportunities Offered to SLA Members

New avenues to volunteering and gaining skills and experience are being made available to SLA members, thanks to the introduction of "micro-level" opportunities such as speaking and writing.

The annual call for volunteers included the customary committee and advisory council positions, but SLA members were also given the opportunity to volunteer for roles that do not require a lengthy or continuous time commitment. These roles are as follows:

- event volunteer;
- short-term subcommittee member;
- speaker;
- author; and
- resource specialist.

The roles are designed to provide members with a variety of volunteer opportunities. Members who signed up to serve as authors could, for example, write an article for *Information Outlook*, a post for the SLA Blog, a white paper for the Shared Resources Initiative, or a marketing message describing the value they receive from SLA membership or conference attendance. Members who signed up to volunteer at events could assist with the SLA Annual Conference or with any other meetings that SLA hosts or co-hosts, such as a joint initiative with another librarian- or information-based organization. **SLA**

Academic Librarians: Adding Value beyond the Library

BY HELPING MAKE COLLEGE MORE AFFORDABLE FOR STUDENTS AND HELPING FACULTY GAIN NEW INSIGHTS FROM HUMANISTIC RESEARCH, ACADEMIC LIBRARIANS CAN SHOWCASE THE SKILLS AND VALUE THEY PROVIDE.

BY PHIL FAUST

There has been a lot of media coverage lately about the state of higher education—that it's going to be the next "bubble" to burst, that it is ripe for disruption, that it's changing rapidly and yet not changing quickly enough. Amid all of this speculation, there are a few things with which most of us can agree—that universities are under pressure to lower the cost of education, better prepare students for jobs, produce better research, and increase enrollment.

Some universities haven't been able to withstand these pressures and have closed their doors. More are expected to follow suit, according to a 2015 report from Moody's Investor Service (2015) that predicts the closure rates of small colleges and universities will triple in the coming years, while mergers will double.

But the news for colleges and universities is not all bad. The challenges facing academic institutions also present opportunities for academic librarians to become more involved with campus initiatives and help support the central mission of their university.

Although academic *libraries* generally are viewed as centers of independent thought and learning, academic *librarians* increasingly are interested in understanding the key business drivers of their universities. As a result, academic librarians are becoming more involved in areas that tie directly to university goals and drivers—specifically, enhancing digital scholarship and affordability.

It Starts with Collaboration

Academic librarians bring many essential skills to university communities beyond cataloging and research, but making their expertise known to colleagues and administrators is among their biggest challenges. There are actual and perceived divides between academic librarians and faculty/administrators.

A study conducted by Gale and *Library Journal* magazine (Albers-Smith 2015) identified large gaps in communication and the perceived need for closer collaboration among librarians and faculty. The 2015 survey of roughly 500 faculty and 500 librarians revealed that roughly one-quarter of faculty think there is no need for campus librarians and faculty to consult with one another. Fewer than half of faculty (45 percent) want better communication with librarians, but nearly all librarians desire better communication with faculty.

This gap in librarian-faculty interest in cross-collaboration is exacerbated by the fact that about 20 percent of faculty are unaware of how the library can even support them. As one academic librarian noted, "Campus culture is that librarians are not 'officially' part of any one of the four colleges in the

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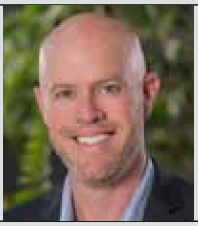

university."

A similar perception gap was highlighted by a 2013 report, *The Evolving Value of Information Management*, published jointly by the Special Libraries Association and the *Financial Times*. The report identified five "essential attributes" of modern information professionals, one of which is understanding the drivers of the organization. One business executive interviewed for the report said, "The classic view of a knowledge manager is that they have insufficient knowledge on issues concerning clients and they are therefore not in the ball game."

Overcoming this perception of "not [being] in the ball game" is critical if academic librarians are to become more involved with faculty and administrators. As it happens, there are emerging areas of scholarship that present opportunities to close the faculty-librarian gap.

Opportunities in the Digital Humanities

One of these emerging areas is digital humanities (DH), or digital scholarship, as it is often called. Digital scholarship is a growing area of focus on college and university campuses around the world.

It's difficult to nail down a universally accepted definition of digital scholarship, but in the most general sense, it's the use of technology to aid in humanistic inquiry. Other terms often used in conjunction with digital scholarship are data mining and textual analysis, which refer to the process by which text or datasets are "crawled" by software that recognizes entities, relationships, and actions and helps researchers draw new conclusions.

There is considerable debate surrounding digital scholarship in terms of exactly what it is and what the future holds for this growing area. Whether you are a champion or critic of digital scholarship, one thing you can't deny is that it is attracting interest, both from university officials and leading organizations outside of higher education. With this interest have come increased opportunities for research funds as well as recognition for schools. Universities need to remain competitive in the market for students, and winning prestigious grants is certainly one way to stand out.

There is also growth in digital scholarship instruction at many levels (including undergraduate and graduate students), and many forms of instruction are emerging, from stand-alone courses to graduate and doctoral programs. Some universities already have dedicated centers for digital scholarship education.

In late 2015, Gale partnered with *American Libraries* magazine on a survey of academic librarians and faculty to better understand how libraries are evolving to meet the increasing needs of digital scholarship. The survey results underscored that this is an area of opportunity for libraries—roughly nine out of ten faculty use digital humanities tools in their research or teaching, and almost all faculty said they think support of digital scholarship elevates the importance of academic libraries. The main reasons cited by faculty for this view included seeing the library as more of a digital center, renewing the library as a central place for research, and demonstrating the value of the skills of librarians (Eberhart 2016).

Partly in response to these findings, university libraries are increasingly taking on leadership roles organizing digital scholarship efforts on campuses. In fact, a quarter of the librarian respondents in Gale's survey said their administration wants them to lead digital humanities in the future.

Academic Libraries Leading the Way

A number of librarians are doing amazing work both developing and leading digital scholarship initiatives, thereby raising their profile within their university community. One such librarian is Caroline Muglia, the head resource sharing and collection assessment librarian at the University of Southern California (USC).

"The library is the perfect place for DH endeavors to be housed," she says. "More and more libraries are being positioned as central drivers of digital humanities projects. I find this so important because we already have so many of the skills. At USC, we are already working with primary resources and interacting with vendors who are making their resources available to DH projects. We are already creating standards and getting our hands dirty in new tools and platforms, and [we] have the capacity to offer new services."

Harriett Green, an English and digital humanities librarian and associate professor at the University of Illinois at Urbana-Champaign, seconds Muglia's assessment. "As we have seen at Illinois and at our counterparts across North America and abroad, academic libraries have begun positioning themselves as key spaces for our users: integrated learning spaces and media commons, hubs for digitization, and multi-service research centers."

Of course, there is still a long way to go and a lot to be learned, as Muglia explains.

"[At USC], we want to continue attracting DH projects that are flourishing around campus, but we first need to know our own capacity, skills, and ability to scale up," she says. "We had a steep learning curve in terms of our own literacy on DH projects. Some librarians had deep familiarity with mapping tools or data mining platforms, but others did not. So we are in the process of educating all librarians on DH fluency, which is a baseline skill that all librarians should have."

Centralizing DH activity is another key priority at USC, Muglia says. "[There are] pockets of digital humanities work being done, but it's not institutionalized in terms of support, financial sustainability, or education," she says. "The library is trying to position itself to take on that role. We aren't there yet, but working with researchers on DH-related projects allows us to hone our own skills and to showcase to the university that the library has the capacity to support this kind of research."

Librarians are also collaborating with

many different departments and audiences both inside the library and out, which is especially important in digital humanities, says Green.

"Collaborations can and should be diverse and multi-faceted," she says. "This kind of work requires engaging with library colleagues and teaching faculty and students about building digital projects. Ideally, librarians can be an integral part of a digital humanities collaboratory—part of a team that co-equally works together to produce innovative and thought-provoking research."

The Affordability and Value Challenge

Another factor affecting higher education today is the mounting pressure to lower the cost of education while maintaining or increasing its quality.

Many college applicants and their families are worried about debt; college admissions officials are concerned as well. According to a 2014 survey of college and university admissions directors, slightly more than three-fourths of respondents believe they are losing potential applicants due to concerns about accumulating debt during college. The figure was even greater (89 percent) for those at private colleges (Jaschik 2014).

While there are many factors involved in the cost of education, the price of learning materials is certainly an important one. Digital formats offer new opportunities to address cost and quality, and more universities are transitioning to digital learning materials.

There is also growing awareness and adoption of open educational resources (OER) and affordable educational resources (AER). OER and AER are commonly defined as free or low-cost openly-licensed educational materials that can be used for teaching, learning, and research.

Cengage, Gale's parent company, recently interviewed industry experts and surveyed more than 500 OER primary adopters, supplemental adopters, and non-adopters. Based on this research, Cengage determined that OER use could triple over the next five years, to comprise 12 percent of the primary courseware market and 19 percent of the supplemental adoption market. Among faculty members not currently using OER, roughly three-quarters said they expect to be using OER or will consider using it in the next three years (Cengage Learning 2016).

These findings present an opportunity for academic librarians to step up as coordinators and leaders of OER and AER initiatives. Many librarians are doing just that, and they are vocal about their support.

OER and AER are not without obstacles—while there is a vast amount of OER content that could be used in education, discoverability is not easy, and quality and durability are concerns. A 2014 Babson Survey found that the widespread use of OER is hampered primarily by difficulty in finding resources, concerns about unknown permissions and quality, and challenges with integrating the resources. The lack of a comprehensive catalog and the difficulty of finding what is needed were cited most often (Allen and Seaman 2014).

Cue the library. University librarians have the skills needed to overcome these challenges—they are already experts at content curation and acquisition and copyright, and they are likely to have already acquired AER/OER in direct support of courses. Working with faculty, librarians can easily identify and curate content that can support OER and AER initiatives.

Library content offers an excellent opportunity to lower students' costs while providing peer-reviewed, well-maintained, and consistently updated information. Leveraging library content (and librarian expertise) in campus OER/AER initiatives is an increasingly valuable way for libraries to support key business drivers of the university.

Keep the Momentum Going

Digital scholarship and college affordability are two of the many areas that are ripe for librarians to take on leadership roles, but the opportunities to make an impact don't stop there. With the value of a college degree being called into question, new standards being considered for rating universities and measuring student learning and career preparedness, and more non-traditional student populations with diverse needs and learning styles being admitted, higher education is facing many challenges to its traditional business model.

These are exciting times for librarians to step up and showcase the unique skills they can bring to the table to help academic institutions thrive. By focusing on the business factors that drive their institutions, they can bridge the gap with faculty and "get in the ball game" with university leaders. **SLA**

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Understanding and Supporting Your Organization's Business Drivers

BY TAKING A FEW SIMPLE STEPS, INFORMATION PROFESSIONALS CAN KEEP ABREAST OF THE OVERALL OBJECTIVES OF THEIR ORGANIZATIONS AND THEN DEVELOP STRATEGIES TO SUPPORT THEM.

BY ALEXANDER VAN BOETZELAER, MA

An October 2013 report, *The Evolving Value of Information Management*, published jointly by the *Financial Times* and SLA, identified "understanding the drivers" of an organization as a key attribute of today's information professional. It turns out that acquiring such an understanding is often easier said than done.

Intuitively, one would think that if you're hired by or already working for an organization, you know what its goals are and, by extension, what drives it. But these things can change, and unless you're constantly aware and have built a strong internal communications network, you may miss out.

That's especially true for information professionals. As one of the business executives interviewed for the report commented, knowledge managers traditionally are perceived as "not in the ball game." That perception may be valid.

Today's information professionals can't afford to be left on the sidelines. Start today to achieve a solid understanding of your organization's current business drivers, determine how you can support those drivers, and let others know the value of that support.

Getting in the Game

The adage "knowledge is power" applies not only to what information professionals have to offer, but also what they stand to gain by tuning in to an organization's key drivers. Many organizations, whether in the corporate or academic realm, continually re-examine their business model to stay competitive. In the process, they may change their business drivers (beyond those of making a profit and ensuring a return on investment). Such changes can have a significant impact on your role in, and value to, the organization.

In a recent blog post, "Setting the Scene for Disruptive Innovation," John Danaher, president of education for nursing and health professions at Elsevier, gave several examples of companies that transformed their thinking about their business. Xerox, for instance, realized it wasn't simply making copy machines, but was actually in the knowledge distribution business. Similarly, Apple recognized that

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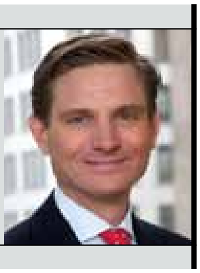

it wasn't just producing hardware, but was also in the business of supporting multiple streaming content platforms (Danaher 2015). More recently, GE has transformed from a manufacturer into a digital business.

Elsevier itself is in the process of evolving from a legacy publisher to a provider of information solutions and analytics, and the way we handled the development and launch of a new product for nursing and allied health professionals is emblematic of our transformation. Instead of relying on our traditional product development process and staff, we put together a multidisciplinary team from a cross-section of the organization, selecting innovative thinkers regardless of their job title or level. They worked like a start-up company, ensconced in a small office in New York, free of their usual day-to-day job responsibilities.

The success of that process (as well as the resulting product) has transformed our thinking, some of our business drivers, and our hiring priorities. Our need for experienced information professionals who understand and can support our current objectives has never been greater.

Granted, not every knowledge professional wants to work in a "disruptive" environment or manner, but it behooves you to understand what you're getting into if you're looking for a job. And if you're working for an organization that's in transition, you need to understand what that transition means for you in your current position.

Staying Informed

If you haven't been staying abreast of your organization's direction and drivers, there are several ways to get up to speed. The strategies are similar whether you're working in academia or in a corporate setting.

Explore the website. Jay Bhatt, liaison librarian for engineering at Drexel University in Philadelphia and a frequent collaborator on Elsevier's educational initiatives, said he regularly visits Drexel's website to review both the university's overall strategic objectives and initiatives and those specific to its libraries. Doing so enables him to not only stay aware of the university's current focus, but also to identify the objectives and initiatives that Drexel's libraries are best able to support.

These include "global impact" and "research innovation," two areas librarians are well positioned to help. Global impact is a fertile environment for librarians because of the tremendous amount of collaboration that occurs between scientists and researchers worldwide, while research innovation offers a multitude of opportunities for librarians to teach information skills to students, faculty members, and researchers themselves and help them stay aware of current international research in their respective fields.

Read the marketing and financial communications. Britt Mueller, principal at InfoLiquidity LLC in San Diego, says that a company's current goals, focus, and values often are clarified in its marketing and financial communications (the latter targeted toward Wall Street). She advocates reading such communications carefully every time they come out, especially to identify and understand drivers for new business opportunities.

Participate in meetings. Although it may be tempting to skip meetings because of time constraints, they can be vital to enhancing your awareness of what's going on in the organization. They also offer opportunities to discuss the projects you're working on and garner support from others, especially higher-ups.

Engage in informal discussions. Bhatt stresses the benefits of engaging in informal conversations with colleagues and end users. In a post on the Drexel Libraries blog, "Where on Campus is Jay Bhatt? Drexel's Embedded Librarian," he is quoted as saying, "With more students, new departments, and new faculty members, it becomes all the more important for a liaison librarian to keep informed [of] departmental needs" (Lee 2014).

To stay informed, Bhatt makes himself available in student lounges two days a week, providing coaching and guidance to students and faculty while learning about their current projects. If he spent his days sitting in the library, he would miss opportunities to help his end users, understand their shifting needs and focus, and reinforce his own value to the university.

On the corporate side, Mueller also advocates talking to end users, especially those working in areas of the company generating high revenue or involved closely with future strategic direction, to understand their goals and objectives. She advises "walking up the value chain"—that is, talking to higher-level influencers, such as the people who control budgets and decide where the company's resources should be directed.

Taking Stock, Taking Action

Having a firm grasp of the organization's business drivers at every level puts you in a position to demonstrate that understanding in ways that support your colleagues and end users and further your career.

Sometimes, opportunities to act on your knowledge of business drivers are right in front of you—you just need to take advantage of them. For example, Bhatt took the lead in the most recent Engineering Academic Challenge, a five-week game sponsored by Elsevier that is played by thousands of engineering students worldwide. Bhatt put together a small group of Drexel engineering students and worked with them over several months to develop what he called "real-world engineering questions, inspired by National Academy of Engineering Grand Challenge themes" (Bhatt and Christe 2016).

In "Epic Wins: Engaging Students Globally with Game-based Learning," Bhatt and co-author Daniel Christe (2016) state, "The Engineering Academic Challenge may be a game, but it is also a thoughtful and deliberate way to engage learners across the world, while supporting the four key directions of Drexel University Libraries' current strategic plan." Broadly, those key directions encompass the library's business drivers through 2017: (1)

ensuring access to ideas and authoritative information sources, (2) deepening the university's connections with scholarship, (3) building learning environments in physical and cyber spaces, and (4) modeling a collaborative and entrepreneurial library organization to serve students, enhance teaching, and support researchers.

When opportunities to act on business drivers don't present themselves, you will need to reach out. But first, Mueller advises, be sure you are clear about what you have to offer.

"You've got to be clear," she says. "Ask, 'What am I doing that's providing value—not just peripheral value, but true value—to the people I'm working with and for?'"

Answering that question may involve some soul searching, as well as research. Knowledge management consultant Ulla de Stricker offers this approach:

> Let us find out as much as we can about the priority activities in the organizations we serve and then devise and promote the optimal mix of services, tools, and content to support those activities . . . Something as relatively straightforward (for us) as curating project-related materials or revamping an intranet interface for greater usability could yield practical value in short order . . . but we must get to the point of accepting that, yes, we are in that business now: anyone with LIS credentials is potentially 'in the business' of working with any process, system, or tool an organization uses to support its operations. Our skills are applicable universally to today's evolving business practices . . . [We] just need to acknowledge that fact and turn that acknowledgement to good use. (de Stricker 2015)

Once you've accepted that you have multiple skills that are of value, you need to demonstrate that value in terms the organization can understand. As de Stricker explains:

> [I]t is particularly important for information professionals to have practiced the 'scary stuff' of business cases, ROI assessments, and similar analyses so as to sell their skills into new roles. In other words, information professionals face an employment landscape in which they are, in effect, required to sell potential employers on the desirability of creating new positions where unique information skills will contribute to organizational goals. Established information center managers are similarly required to demonstrate the value and ROI of the infrastructure costs they incur for the parent organization; they are in effect becoming agents for hiring and deploying information professionals working directly with subject matter experts. Scary, yes; doable, yes. (de Stricker, 2015).

Armed with a strong handle on your value and how to express it in terms that support the business drivers, it's time to craft a "cogent, concise, and well-structured message," Mueller stresses. That message is not, "Let me tell you what I can do for you." The message starts with two questions—namely, "What are you struggling with in terms of information?" and "How can I help support that?" Then tailor what you can do to the needs of the people you're talking to.

Keep in mind that you're not approaching people hat in hand. "You are an equal partner at the table, trying to solve the same problems, trying to make the company successful," Mueller says. "You're trying to get to a mutual understanding, and you're trying to build a relationship. If you can do that, you're in good stead. You're going to have some successes and some flops, but you need to push forward."

Looking Ahead

Simply put, once you understand the organization's drivers, do something meaningful with that knowledge. Secure in your skills, and knowing how to quickly determine the overarching drivers of any business—e.g., by looking at the website and reading current communications from and about the organization—you are in a good position to show value in your current role or interview for a new one within your organization or elsewhere.

Given the changing landscape of knowledge management, it is important to stay flexible and avoid pigeonholing yourself. As John Danaher (2015) wrote, "The CEOs of Airbnb and Uber didn't come from the hotel or transportation businesses. They brought a fresh pair of eyes, and because they did, they came up with innovative services."

You can, too. **SLA**

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10 Questions: Stacie Calabrese

A LAYOFF MADE STACIE CALABRESE REALIZE SHE NEEDED TO LEAVE HUMAN RESOURCES BEHIND AND FIND A NEW PROFESSION. HR'S LOSS WAS LIBRARIANSHIP'S GAIN.

BY KELLY A. JOHNSON, MS, DVM, MLIS

Many librarians, especially those of us who work in special libraries, share a similar story of adopting librarianship as a second career. And though many of us do not consider librarianship until we are ready to make a career change, special librarianship frequently allows us to utilize the skills and experience we accumulated in our previous field(s).

Stacie Calabrese is a case in point. Currently the library manager for a medical communications company, Stacie takes advantage of her 10-year career in managing human resources (HR) for the pharmaceutical industry as she provides information services to clients and especially to internal medical writing teams.

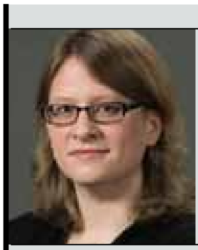
Stacie spoke recently with *Information Outlook* about her path to librarianship, how she stays abreast of new developments and learns new skills, and how she maintains a healthy work/life balance.

Before attending library school, you held HR positions in the medical and pharmaceutical fields. How and why did you get into librarianship? Were there any compelling financial or personal incentives to make a career change?

I spent about 10 years in human resources, but after a few years it didn't feel like it was the right fit for me. With a master's degree in HR management and increasingly responsible positions, I started feeling that it was unlikely I would be able to make a career change. Human resources is a very important function, but it wasn't right for me. The things I enjoyed doing—researching and compiling information—were small parts of my job in comparison to the other functions like employee relations and recruiting.

Then I was laid off in 2009, when the economy was at its worst and the competition for jobs was intense. I was struggling to find a position, yet realizing that I didn't feel passionate or excited about any of the jobs that were out there. One day I decided to investigate other careers that might work with my interests, and I discovered different types of librarianship, including special libraries. Up to that point, I'd only really known about public and academic/school libraries. I hadn't felt such enthusiasm about any career in years, and I quickly made the decision to apply to library school.

We often hear people say that library school isn't necessary to prepare for librarianship. Even some librarians



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Stacie Calabrese

express frustration at having had to earn an MLS degree in order to keep jobs they were already performing well. Do you feel you gained relevant skills through your MLS that you would not have learned on the job (or at least not as easily or quickly)?

This is a tough one. I can see both sides of the argument, and I know people who are functioning as librarians who haven't completed library school. However, for me, I think I did learn skills that I probably would not have been able to pick up as easily on the job.

The first one that comes to mind is searching. My knowledge of literature searching was tenuous at best when I started library school. Going through the process in a systematic way and learning all of the ins and outs gave me a solid foundation that I was able to bring to the job. When you learn on the job, you often learn one person's style or method, and that might not always be the right way. Library school allows that solid foundation to be set.

That said, I do think it is essential to have some kind of work experience while in library school. Academic learning combined with real-world experience is the best way to be prepared upon graduation.

How do you respond when people say that librarianship is a dying profession, or at least a less relevant one? Is there anything about your experience to suggest the opposite?

Librarianship is certainly changing. Perhaps one could argue that some of the old ways are dying off, and if someone were trying to operate as a librarian without up-to-date skills, he or she would certainly be obsolete. There is definitely a large group of people who don't use libraries at all—they search the Internet and read e-books, and that fully satisfies their information needs. On the other hand, my department has grown since I joined the company three years ago, and most of the complex research we are doing in proprietary databases is not accessible by others.

We've been saying for years that the profession needs to reinvent itself, and I think it has. We are using and teaching technology to reach and teach people, which is one of the most important things. We should be embracing the opportunities to improve information literacy so patrons can access information.

How important do you think your HR experience with pharma was to your transition into your current position? Or, more specifically, how easily do you think other librarians without pharma/medical backgrounds could do the same?

I don't think my HR experience specifically helped, other than to situate me into working in a corporate environment. My experience within the pharmaceutical industry, however, was extremely helpful. I had a strong understanding of the drug development process, as well as a lot of the terminology and an understanding of how the industry works.

I think having a solid background in the industry, combined with attending library school, helped me land my first job in the library of a large pharmaceutical company. But even though I have a greater understanding of the industry than the average person, I am not a scientist. I've made a conscious effort over the years to try to educate myself to the extent that I can without going back to obtain another degree. This has included non-credit coursework at community colleges.

Other than taking advantage of the courses you mention, how do you stay up to date? The medical and pharmaceutical fields change so rapidly! Are there any continuing education opportunities that are especially relevant for you?

In 2014, I had the amazing fortune of being accepted into Copyright X, which is a networked course offered by Harvard Law School, HarvardX, and the Berkman Klein Center for Internet and Society. It was a fascinating course that explored the current state of copyright law and ongoing debates about reform. It was a rigorous 12-week course delivered through pre-recorded lectures, weekly interactive seminars facilitated by Harvard law students, webcasts, and online discussions, ending with an intense pass/fail written test.

Copyright X was one of the best courses I've ever taken, and I was thrilled to be accepted and successfully pass the test. Lately I've been looking into digital asset management courses as my next undertaking.

Do you feel developing professional relationships is more difficult for you, since you are part of a relatively small group of niche librarians and you work primarily from home?

I manage a department of three, and even though we are spread out across the country, we stay connected

During a 2012 vacation in Hawaii, Stacie swam with sharks, walked along the "terrifyingly narrow" Hana Highway, and deepened her love of pineapples.

Stacie (in glasses) and fellow fans of the New Orleans Saints watch a game at a bar on the Lower East Side of New York.

regularly through phone calls and chat programs. Outside of the workplace, organizations like SLA are crucial in maintaining connections. This applies on both the local chapter level and at the national conference. Finally, even though I work primarily from home now, I maintain the connections I made when I was starting out my library career in an office.

On the topic of working from home, do you have any advice on recognizing when to punch the proverbial clock?

At the risk of making myself sound like a slacker, I will admit that I rarely have issues with stepping away from work when it's time to do so. Of course, if things are really busy, I will put in extra hours as needed, just as I would if I were in the office. However, I feel like it's really important to make an effort to establish a work-life balance to avoid burnout and spending all day working.

I've set up a fairly regular schedule for myself that includes a morning walk and a lunchtime walk. It's really important for me to be able to step away and recharge so I'm able to tackle work with a fresh mind. I also often sign up for exercise classes and events that take place locally in the evenings—it helps force me to step away and move on to other activities that are going to help me refresh myself for the next day. Also, it definitely helps that I made the decision not to have my work e-mail sent to my phone!

When I was in HR, I felt like I was on call 24/7, responding whenever my Blackberry buzzed. I think constant access to work via mobile devices is what truly prevents people from moving out of work mode, whether they work in an office or not.

Other than supportive professional networks, what do you feel is the most compelling reason to belong to SLA? Do you have any favorite experiences from the national conference or from your local chapter?

Staying connected is one of the most compelling reasons for me. It's extremely valuable to be able to meet others who are similarly situated and learn from each other. I also love that it seems like there is a strong amount of outreach and effort to be inclusionary. Sometimes it's easy to dismiss an e-mail blast, but having personal invitations to participate in programs or opportunities can make a huge difference!

SLA membership has also allowed me to broaden my knowledge through various programs put on by chapters and divisions. I love that so many programs are web-based and available to all.

You've mentioned to me before that you enjoy live trivia and geocaching in your spare time. Do those interests allow you to use any of your librarian sleuthing skills?

Yes, very much! Geocaching is a global scavenger hunt for objects hidden at specific GPS coordinates. I've been into geocaching for a few years, and I've learned that even when you get to the coordinates, the location of the geocache isn't always obvious. Just like a reference interview requires taking a deeper scan, geocaching requires astute observation of the environment and the need for "geosense."

As for trivia, it's similar to librarianship in the need to look for clues and take a deeper scan. A lot of times, the questions include pretty heavy clues, so just slowing down and taking time to consider all of the information allows me to figure out the answer, even when it's very often something I didn't "know" when I woke up that morning.

Finally, what is your earliest memory (or favorite early memory) of a book or library?

I remember reading obsessively, to the point where I would drive my parents crazy by wanting to read at the dinner table or even while walking on the boardwalk during a family vacation! I also remember going to the public library as a child and checking out stacks of books. At the time, I never considered a career as a librarian. As much as I loved the atmosphere, it wasn't something that even occurred to me.

Even though what I do is very different than public librarianship, I sometimes think about my early days of enjoying the library. I appreciate the programs and efforts that allowed me to experience so much joy and satisfaction from losing myself in books and learning. **SLA**

Teaching Competitive Intelligence to Business Students

A poster presented at the SLA 2016 Annual Conference described a collaboration between library and business school staff to introduce business students to competitive intelligence techniques and their associated resources.

BY HAL KIRKWOOD, MSLIS

The Roland G. Parrish Library of Management & Economics at Purdue University has a strong relationship with the Krannert School of Management. This relationship includes an extensive business information literacy program that is incorporated into undergraduate courses. At the graduate level, library staff have been able to offer a recurring business information literacy workshop as part of a leadership discussion series that the master's program maintains.

During the 2015-2016 academic year, an opportunity arose to develop the workshops into a full credit course due to a growing need in the graduate program for one- and two-credit "short courses." Discussions took place between library staff and the directors of the program to map out how the workshop could be turned into two for-credit courses.

The first course I designed was a one-credit-hour short course on international business research and competitive intelligence. It was specifically designed to synchronize with the Krannert School's international program, in which students take a selection of courses on the Purdue campus and then, within the same semester, travel to a foreign city to experience its business environment and overall culture. The course combines international business, country, and city research with competitive intelligence techniques and focuses on the students' destination, so that the information will be immediately relevant when they travel.

The course content is organized using a problem-based methodology so that the students, working in teams, attempt to find information within a designated framework. The framework includes a global outlook brainstorm, a country profile, a country risk assessment, and an international company review. All of these elements combine to create an intensive two-day course that prepares the students for their trip while at the same time providing them with experience in competitive intelligence techniques and introducing them to a variety of free and library-supported resources.

The second course I created was a two-credit-hour introductory course on competitive intelligence that includes information about CI methods and business information resources that supply relevant information to these methods. The course is structured similarly to the international business and competitive intelligence course in that it presents a selection of competitive intelligence techniques, each coupled with associated resources that supply relevant information. Each technique and set of associated resources is placed within a business problem-based scenario in an attempt to make the assignment more relevant. In such a short time frame, it is not possible to provide much depth, but the format gives the students a reasonable taste of competitive intelligence.

To provide context for the competitive intelligence techniques, the students work within their teams on a simple exercise of matching nearly 45 different CI methods with a selection of broad analysis categories to show scope and depth. Then, over the next several class sessions, a number of CI methods are highlighted, including competitor cash flow analysis, SWOT (strengths, weaknesses, opportunities, and threats), event analysis, Porter's four corners and five forces, and a social media audit. Each student team is then assigned to represent a competing company within a specific industry and given a forward-thinking problem to analyze. The teams must decide how their company (and their competitors) will likely tackle the problem, thus forcing them to collate all of the information they have gathered into a final problem-solving recommendation.

The response to both courses has been extremely positive thus far, demonstrating that the mix of theoretical and applied information is useful and valuable to the students. Going forward, the two courses will follow different paths. The Krannert international program is discontinuing the overseas trip, so in the short term, the international

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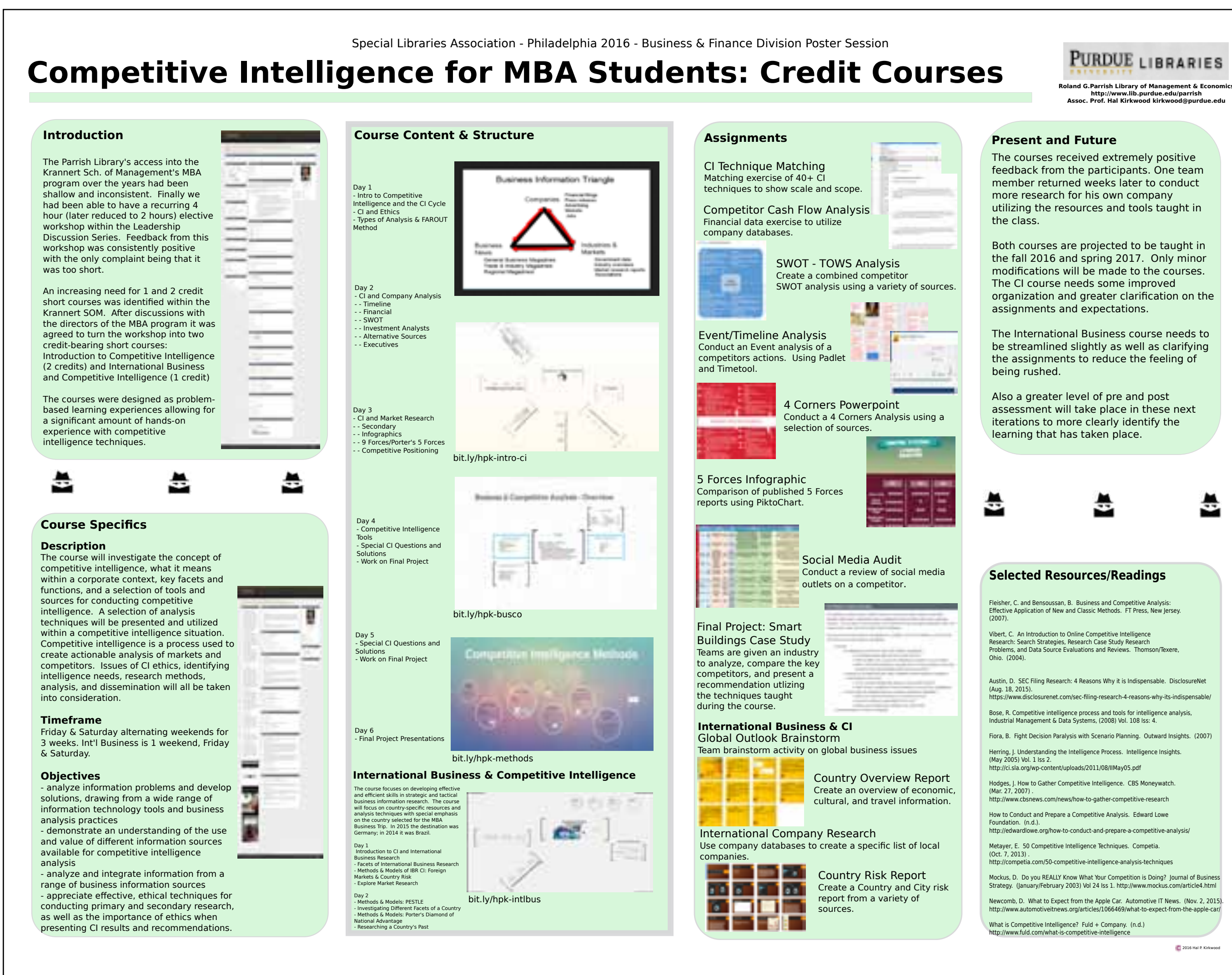
business and competitive intelligence course will be put on hold. The current plan is to develop it as an online course tied to Purdue University's badge system. (Purdue University developed Passport as a learning and e-portfolio system that uses digital badges to demonstrate competencies and achievements; see http://www.itap.purdue.edu/studio/passport/ for details.) The Introduction to CI course, meanwhile, will continue with only minor adjustments, the most significant being to improve upon the overall assessment of the course to track its reception and impact more precisely. **SLA**



Hal Kirkwood's poster depicting the content and structure of two "short courses" on competitive intelligence that he designed for business students at Purdue University. He presented the poster at the SLA 2016 Annual Conference in Philadelphia.

10 Things to Know About Copyright Law

Librarians and information professionals with a strong grasp of these copyright provisions and concepts will find it easier to legally use content.

BY LESLEY ELLEN HARRIS

Finding your way through the maze that is U.S. copyright law is challenging. Do you have to register a work to protect it under U.S. copyright law? Can you share a PDF of an article that you accessed through your licensed database? Does fair use give you much latitude in using copyright-protected materials?

These are some of the many questions that librarians and information professionals face in their day-to-day work. Following are 10 essential things every librarian and information professional should know about U.S. copyright law. Note that it was not easy to narrow this list down to 10 points—they really are just the tip of the iceberg.

Ideas are not protected by U.S. copyright law. U.S. copyright law doesn't protect ideas, facts, historical facts, or news. It's the *expression* of ideas (and facts, news, etc.) that's protected by copyright. This means you can summarize an article or write a blog post based on news events, as long as you don't reproduce or copy the article or news story.

The creator is generally the first owner of a copyright-protected work. The general rule of ownership is that the creator of a work is the first owner of its copyright. This general rule is, however, subject to a number of exceptions. One such exception is the "work for hire" provision, which stipulates that employers, under certain conditions, own the copyright in works created by employees during the course of their employment.

Copyright protection is automatic. Copyright is automatic upon the creation of a work in a fixed form—for example, written on paper, saved to your computer's hard drive, or stored on a memory card in your camera or phone. The copyright symbol and notice (for example, © Smart Copyright Corp. 2016) doesn't have to be affixed to the work for it to be copyright-protected.

Registration with the U.S. Copyright Office is voluntary. Registering works with the U.S. Copyright Office, which requires depositing a copy of the work, isn't mandatory for copyright protection, but it does provide some benefits. For the copyright owner, registration provides a presumption of copyright ownership and confers certain benefits when pursuing a copyright infringement lawsuit. From a librarian or other user's perspective, registration makes it easier to identify the copyright owner and facilitates the permissions process. However, since registration is voluntary, a search of the Copyright Office's records may not yield the information you need.

Only the copyright owner has the "right to copy." Copyright is, literally, the "right to copy" and includes a "bundle" of rights. Section 106 of the U.S. Copyright Act sets forth the following exclusive rights for authors of works:

(1) to reproduce the copyrighted work in copies or phonorecords;

(2) to prepare derivative works based upon the copyrighted work;

(3) to distribute copies or phonorecords of the copyrighted work to the public by sale or other transfer of ownership or by rental, lease, or lending;

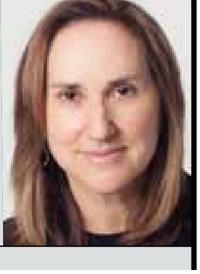
(4) in the case of literary, musical, dramatic, and choreographic works, pantomimes, and motion pictures and other audiovisual works, to perform the copyrighted work publicly;

(5) in the case of literary, musical, dramatic, and choreographic works, pantomimes, and pictorial, graphic, or sculptural works, including the individual images of a motion picture or other audiovisual work, to display the copyrighted work publicly; and

(6) in the case of sound recordings, to perform the copyrighted work publicly by means of a digital audio transmission.

Copyright duration in the U.S. is life plus 70 years. The international norm for the duration of copyright protection is the life of the author plus 50 years, as set out in the leading international copyright treaty, the Berne Convention. However, some countries, including the United States and European Union

LESLEY ELLEN HARRIS is a copyright lawyer, author, and educator and the founder and publisher of the copyright resource site Copyrightlaws.com, where she explains copyright law in plain English. Visit Copyrightlaws.com to subscribe to its free weekly copyright e-letter.



countries, go beyond this norm and now provide copyright protection for life plus 70 years.

You must have permission to use a copyright-protected work, even if it's an orphan work. With few exceptions, you need permission from the owner of a copyright-protected work to use it. That said, it isn't always possible to locate a copyright owner. The works of copyright owners who cannot be located are called "orphan works." If you can't identify or locate a copyright owner (or if a copyright holder doesn't reply to your permission requests), there's no mechanism under U.S. copyright law that allows you to legally use that work.

You don't need permission to use a work that's in the public domain. If a work is in the public domain, you can use it in any manner—even modify or adapt it—without obtaining permission. Some works are in the public domain because their copyright duration has expired or they didn't qualify for copyright protection in the first place (such as most works of the U.S. government).

There are some limitations on copyright. The U.S. Copyright Act balances the interests of copyright owners with those of content users by including limitations on the exclusive rights of owners, such as fair use and specific exceptions. However, the act doesn't explicitly set out which uses constitute fair use; instead, it sets out (1) types of uses to which fair use might apply and (2) factors to consider in determining whether a use may be fair use.

The ultimate arbiter of fair use is a judge in a court of law. Due to the ambiguity of fair use and the risk involved in applying it, some enterprises avoid it. You should know your organization's policy and procedures on making a fair use judgment.

In addition to fair use that might apply in your library, section 108 of the U.S. Copyright Act sets out specific uses for eligible libraries where permission and payment are not necessary. These uses include preservation copying and copying for interlibrary loans.

U.S. copyright law applies to copyright-protected materials used in the United States. Since 1989, the United States has been a member of the leading international treaty on copyright, the Berne Convention, which is administered by the World Intellectual Property Organization (WIPO). In 1999, the United States joined the two WIPO digital/Internet treaties. From an information professional's perspective, this means that when reproducing or sharing copyright-protected materials from the other 171 Berne country members, you should apply U.S. law if you're using those materials in the United States. **SLA**

Diigo Communities: Capturing, Sharing, and Exploring Websites

A tool that facilitates the sharing of websites and allows for annotation and tagging can help you collaborate on projects, find paths to new content, and deliver training materials.

BY DAVID STERN, MLS

My last column explored the pros and cons of various shared-screen collaboration tools; in future columns, I will focus on personal information management tools, shared collaboration spaces, and other empowering technologies. But right now, I want to look at a free tool that facilitates local and global sharing of websites, can be used to create online communities, and can also serve as a unique exploration tool.

In its simplest manifestation, diigo (www.diigo.com) can be used as a personal cloud-based URL recording tool. The My Library option provides a web-based means of capturing interesting URLs, allowing Diigo to be used as a favorites or bookmarks tool that can be accessed from any workstation. Diigo also permits you to enter annotations (keywords) and tags for each entry, making it much easier to organize, associate, and retrieve saved URLs.

Beyond metadata storage and retrieval, diigo also allows users to capture a snapshot of the viewed page for historical reference. It even allows users to highlight and annotate portions of the snapshot. This feature can be used for personal reminders, group collaboration, and teaching purposes.

All of these functions can be performed using a locally installed diigo toolbar if you have permission to enhance your web browser (there are Chrome, Firefox, and Opera extensions). If you are operating on a locked-down public workstation, you can use the drag-and-drop Diigolet on all major browsers with no download or installation required. There are also apps for iPhone and Android mobile devices.

Applications for Personal and Group Sharing

For personal use, the ability to add keywords as tags means you can easily organize your materials into clusters and search for items using personal folksonomies. The software even provides suggested terms based upon the content found in the page. Browsing your favorite URLs by concepts is easy and effective. URL records are, by default, added to the global diigo community, but they can be restricted to personal viewing, allowing you to save URLs and associated passwords and other types of privileged information.

URL records can be proactively shared in a number of ways. Under the broadest (default) sharing option, your records are added to the global diigo community and can be found by any searcher. Tag searching is also, by default, performed across the entire diigo community. The tags can also be used as the basis for deeper browsing, as they are linked to related tags, related interest groups, and top contributors. Using the global community search option, you can effectively use related links from other diigo members to identify common interests.

Records can also be associated with community interest groups, thereby allowing you to browse socially discovered URLs by topic rather than relying on keyword searching. Within interest groups, you can also browse by tags, by most recent entries, by most popular records, and by top contributors. You can use https://www.diigo.com/tag to search for communities or to browse community tags by alphabetical listing, by frequency of word entries, or by related terms.

For more controlled sharing options, you can create your own public or private groups. This allows you to, say, collaborate on a local project using shared and annotated links, or populate a private space in which documents can be added to records as snapshots. Searching can be limited to selected search domains (e.g., "my public groups" or "my private groups"). Virtual communities can be generated quickly and dissolved at any time.

It is also possible to use tags to build virtual communities, allowing common interests to be shared broadly without creating a group. You can create special tags to allow for more targeted searching—for example, the tag #sternchem would allow others who know the code to find your designated chemistry records, while #sxuchem would provide a search option for locating the organizational interests of all Saint Xavier University chemists. In essence, you are creating a local community by tagging all interesting items with #sxuchem to make them easy for your associates to identify.

Tag-based materials cannot be kept

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private. Users determine when to create groups and when to share information more informally using special tags.

Local interest groups and tag-based communities facilitate the development of long-term community relationships. Imagine continuing to share interests with those who have left your organization (such as former colleagues and/or alumni). What a great way to maintain contact with them and provide a forum for alternative perspectives from other types of environments over time.

Diigo also allows you harness the power of serendipity by browsing other people's public interests and using their links as pathways to new content. Browsing can be performed across known individuals, pre-created groups, and/or random tags based upon a single URL or keyword. In this way, you can survey link connections to explore and discover interesting new URLs.

The advanced search option (https://www.diigo.com/people/search/advance) allows you to search for people across the entire diigo community by tags, by URL, by industry, and by geographic location (to limit results). You can then investigate their interests and websites by browsing their tags, their groups, their followers, and their public bookmarks.

Finally, you can use diigo to support training and teaching initiatives. Using screen captures with highlighted sections can be an effective way to demonstrate relevant web material for particular concepts. Diigo provides a free platform for handling your teaching materials—records can be grouped for shared display and/or collaboration, depending upon the permissions you choose.

Take diigo for a spin and see what types of creative uses you can develop. **SLA**

Info Insights

Continued from page 1

- Participate in meetings, especially those with higher-ups.
- Engage in informal discussions with co-workers.

"Given the changing landscape of knowledge management, it is important to stay flexible and avoid pigeonholing yourself," he writes. "[And] once you understand the organization's drivers, do something meaningful with that knowledge."

To learn more about understanding the drivers of your organization, read the articles by Faust and van Boetzelaer in this issue of *Information Outlook*. **SLA**

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