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Information Outlook, December 2005

Special Libraries Association

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Vol. 9, No. 12
December 2005

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Remembering 2005

Janice R Lachance

This time of year often reminds us to reflect on the past and look forward to an exciting new year. For SLA and the global community of information professionals, 2005 was particularly exciting because it brought a range of transitions that I believe mean great things for our future.

Our year started with a newly-formatted SLA Leadership Summit in Tampa, Florida. Historically, this event has focused on leadership training for SLA volunteers. Starting in Tampa, we expanded the focus to include workplace leadership development. During a speech at the Summit, I openly challenged the volunteer leaders of our chapters and divisions to make our community supportive, nurturing, and innovative for all members and partners. Too often, we care so much about something that we lose sight of the need for positivism and comity, which hinders the growth of the very thing we love. I continue to remind SLA members to support one another and respect opinions that differ from our own, no matter the outcome.

At headquarters, the SLA Annual Conference became our passion through the early months of the year. Many new elements were designed to make the experience attractive to you and your colleagues, and I think we succeeded—particularly judging by the dramatic increase in attendance over the previous year. Being in Toronto with so many inspired and motivated SLA members and partners confirmed my belief that the library and information profession is full of great people. We celebrated the best of the profession in our award winners and honorees; we talked about the opportunities that lie ahead, keeping an eye on the many challenges facing us; and we heard from some of the best minds in the world on topics ranging from business strategy to blogging and RSS feeds. And the hundreds of companies participating in the Info-Expo helped to generate a great deal of energy and coolness about the total SLA 2005 experience.

During the Annual Conference, we launched SLA's Click University, the first and only online learning community designed specifically for librarians and information professionals. This service, available only to SLA members, is beginning to serve as the cornerstone of our efforts to prepare you for the workplace of the future and position SLA as the preferred community for librarians and information professionals of all backgrounds, in all areas of expertise or practice, regardless of geographical or time zone limitations, to learn and grow together. You will find that Click University is anticipatory of your needs, but also flexible enough to be shaped by the growing demands of this profession. I can't think of a better way to drive value for you and your colleagues and show a return on investment for years to come! Take a look at Click U today by going to www.clickuniversity.com—and let us know what you expect from your new online learning community!

While we were in Toronto, SLA members in attendance voted on two changes to the association's bylaws. The first aligns our governance year (when officers and Board members are elected) with our fiscal year (when our budgets take effect). The second —my personal favorite—paved the way for SLA members to vote electronically on future bylaws amendments and in Board elections. I cannot emphasize how important that change is, and will be, for future generations of SLA members.

We didn't have to wait long to witness the impact of the decision. The SLA Board of Directors, while meeting in Toronto, approved a restructuring of SLA's dues system. This move represented the culmination of two years' hard work by the Board, the SLA Finance Committee, the association's Chapter and Division Cabinets, and the SLA Kentucky Chapter—who broached the subject in the first place. Many SLA members worked hard to find an effective way to lower the costs for participation in our community without damaging the financial stability of the association. The restructuring required the elimination of the SLA Bylaws' 12 percent cap on dues increases—a provision that had been in effect only since 2002. And so, armed with our newfound freedom to conduct electronic voting, we set about the process of asking SLA members to eliminate that cap in order to facilitate the implementation of the dues restructuring plan. With over 2,700 members voting, the amendment was approved with 77 percent of the vote.

The entire voting experience in September and October was a great lesson in participatory democracy in action—with a modern twist. Those of you who never had the opportunity to vote because of your inability to travel to SLA Annual Business Meetings must have felt some exhilaration over the ease with which you could determine the future of your professional association. From our perspective here at SLA Headquarters, the dialogue and the balloting were very instructive and energized us as we began to plan for 2006.

Finally, the last major association-wide event took place in late October here at SLA Headquarters, as the Board of Directors met to approve the 2006 operating budget and consider a wide range of opportunities facing us. I must commend our colleagues on the Board for their professionalism and candor during those meetings. I was truly impressed by the level of dialogue and the focus on transparency, strategic goals, and member/partner needs. You can be proud of the people you've elected to represent you on the Board. They are doing a great job of leading us in the right direction.

As we look forward to 2006, you can be sure of one thing: we will replicate the successes of 2005 by refusing to stand still and by keeping our focus on innovation, quality, and your professional needs. Remember to help us make SLA a positive and supportive community for all information professionals. I look forward to the journey with you. Best wishes for a healthy and prosperous new year—and don't stop thinking about tomorrow! Your enthusiasm for our collective future will breed enthusiasm among your colleagues.

web sites worth a click

By Carolyn J. Sosnowski, MLIS

Directory of International Film & Video Festivals

www.britfilms.com/festivals

One might think of film festivals as a place for the glitterati to socialize and congratulate each other. That might be true of the Cannes Film Festival (although I have not been, that is the impression I get from *People* magazine), but there are many smaller festivals, right where you live, that show good stuff...trendy attire not required. Some events feature new movies; many more feature older movies that fit the festival theme. The searchable directory of events across the globe provides basic information—genre(s), dates, submission requirements (if you are on the filmmaking end of things), and links to the festivals' own sites. Find one in your neighborhood.

del.icio.us

http://del.icio.us

These days, the Web world is very social and interactive. All that blogging and Skyping going on...but have you tried del.icio.us? It's a free tool that allows you to share your favorite sites with the world. In addition to the ability to view others' links, you may also subscribe to individuals' lists and/or receive updates via RSS. To facilitate finding links of interest either within one list or across all of del.icio.us, each entry is "tagged" by the owner with one or more descriptors. With some exploring, you'll be able to find some sites useful for your work (and your free time).

ReliefWeb

www.reliefweb.int

ReliefWeb, established by the United Nations in 1996, provides up-to-date information about disasters and other emergencies around the globe. Through various resources, including documents, maps, and news feeds, relief workers and other researchers can learn about the needs of countries recently affected by natural disasters, read about issues such as recovery funding, and study detailed maps of

news briefs

New 'Who's Who' Includes Rap Star, Indy Rookie

From Nobel Prize-winning physicists to the all-time Jeopardy champion, the 2006 edition of Who's Who in America features the most diverse group of achievers, leaders and superstars ever assembled in the 107-year history of Marquis' Who's Who in America.

With more than 100,000 biographical profiles, this 60th edition of Who's Who in America includes the famous and infamous, the old and the new. From new Chief Justice John Roberts to Paris Hilton, the 2006 edition of Who's Who in America profiles individuals from all walks of life.

This year's edition includes thousands of first-time profiles, a diverse group that includes:

- Kanye West (controversial rap star)
- Jonathan Ive (Apple VP and designer of the iPod)
- Danica Patrick (IndyCar Series Rookie of the Year and highest woman finisher in Indianapolis 500 history)
- Eva Longoria (Desperate Housewives star)

Who will you find in the 2006 edition?

- From the highest highs (seven-foot-seven basketball star Yao Ming) to the lowest depths (Six Feet Under creator Alan Ball)
- There are defendants (Michael Jackson), lawyers (Mark Geragos) and judges (Chief Justice John Roberts)
- It looks back (historian David McCullough) and forward (physicist Stephen Hawking), to the skies (astronaut Neil Armstrong) and even to the heavens (evangelist Billy Graham)
- Tenors (Luciano Pavarotti) and Sopranos (James Gandolfini)
- Martha Stewart, who not only survived her prison term, but came back stronger than ever… and "that's a good thing"
- You'll even find the left wing (Michael Moore), the center (Shaquille O'Neal) and the right wing (Rush Limbaugh)

Marquis also publishes Who's Who in the World®, Who's Who in American Politics®, Who's Who in American Art®, Who's Who in Science and Engineering®, Who's Who in Medicine and Healthcare®, Who's Who of American Women®, and several other titles. For more information, see www.marquiswhoswho.com.

Factiva's Clare Hart Wins New York Ten Award

Factiva President and CEO Clare Hart has been named a winner of The New York Ten Awards™, an annual award recognizing 10 leaders in the greater New York business community who have, through their innovation, significantly impacted their organizations and industries.

Other 2005 "Ten Awards" Winners include:

Randolph Altschuler, co-CEO, OfficeTiger; Clayton Banks, founder, president and executive producer, Ember Media; Naftali Bennett, CEO, Cyota; Ann Fudge, chairman and CEO, Young & Rubicam; Jeffrey Herzog, chairman and CEO, iCrossing; Rajiv Laroia, founder and CTO, Flarion Technologies; Tarek Sherif, CEO, Medidata Solutions; Stephen Ward, CEO, Lenovo; Josh Wolfe, co-founder and managing partner, Lux Capital; and Janis Schodowski, executive director, Lollipop Theater Networks, recipient of special "Judge's Award" for civic/nonprofit leadership.

"Ten Awards" winners were chosen from among 20 finalists, drawn from more than 130 nominations submitted to The Executive Council and evaluated by a panel of prominent from New York-based local and national business media outlets. Nominations were evaluated based on the individual's contributions to his or her organization's objectives and leadership; the organization's impact on business innovation, both in New York and nationally; and the individual's industry leadership beyond his organization.

news briefs

SLA Extends Member Benefits for Disaster Victims

SLA is extending the membership benefits of dozens of members around the world who have been adversely affected by recent natural disasters of global magnitude.

The one-year extensions are being provided gratis and without request or application to SLA members living and working in U.S. Gulf Coast areas devastated by Hurricanes Katrina and Rita in August and September and those affected by the Southeast Asia tsunami of December 2004. Benefits will also be extended for members suffering due to the Pakistani earthquake of October.

SLA hasn't yet been able to determine the number of members affected by the massive earthquake there.

"We have members who have suffered horrific, cataclysmic disaster," said SLA President Pam Rollo. "They are working to rebuild the most fundamental parts of their lives. They are not positioned to access or utilize the SLA benefits they paid for, nor is that their priority.

Extending their SLA memberships symbolically extends a hand of friendship, hope, and support from their professional colleagues. But also, it's only fair—these members are not positioned to utilize their benefits now, so their SLA member services will be waiting for them when their lives return closer to normal," she said.

Immediately following the Southeast Asia tsunami, SLA established a task force to help information professionals worldwide with disaster relief and recovery. The task force, called the Information Professionals' Alliance on Natural Disasters and Accidents (IPANDA), expanded its work and continues to maintain the IPANDAnet Weblog to deliver disaster-specific news and information (http://slablogger.typepad.com/ipandanet/). SLA also maintains an up-to-date Web Portal with information resources focused on disaster planning and recovery (http://www.sla.org/content/resources/infoportals/memorial911.cfm). The SLA Career Center available on the Web site provides a host of free services for members, including a global job bank. (http://sla.jobcontrolcenter.com/)

Online Content Spending Jumps

Consumer spending for online content in the U.S. grew to $987 million in the first half of 2005, an increase of 15.7 percent over the same period last year. For the first time ever, in the second quarter of 2005, quarterly sales of content topped half a billion dollars.

The information comes from the Online Publishers Association's Paid Content U.S. Market Spending Report, based on a study conducted by comScore Networks.

Spurred by growth in online music sales, entertainment/ lifestyles overtook personals/dating to become the leading paid content category, with consumers spending $264.8 million on the category in the first half of 2005. Personals/dating grew to $245.2 million in the first half of 2005, while business/investment content remained in third place with spending at $159.1 million.

The entertainment/lifestyles category was by far the fastest-growing paid content category in the first half of 2005, up 44.8 percent over the same period last year. However, after registering steady declines during the first half of 2004, the research category also surged back with a 33.8 percent year-over-year increase, the second-largest percentage gain among all categories. Games and personal growth were also up significantly, by 22.5 percent and 19.4 percent, respectively.

web sites worth a click

areas ravaged by storms, earthquakes, and other causes. The indexing for this site is extensive, and the advance search function provides multiple options for narrowing your search. Users may also customize the site with the MyReliefWeb tool, where content of interest may be saved.

Technorati

www.technorati.com

In previous columns, we've explored individual blogs. You may have identified and subscribed to some favorites, but here's a new way to find blogs of interest: Technorati. Technorati is a search engine for blogs. More specifically, it searches blog content and finds links to particular blogs. As a bonus, you can also browse and search the tags assigned to blog posts. The Blog Finder function is in beta, but it finds blogs by subject. Free membership entitles users to create a profile and a Watchlist, essentially an RSS feed for blogs you choose to follow closely. With all this functionality, it's easy to tap into the blogosphere.

OCLC Top 1,000

www.oclc.org/research/top1000

Which resources are the most popular among OCLC member libraries? Here's the list. At the top is the Bible; at the bottom (number 1,001) is *Ecclesiastical History* by Eusebius. And in between are the titles that could be used as a "must read/listen" list, from multiple works by C.S. Lewis to Huxley's *Brave New World*. Besides the actual list, there are other things to enjoy here—subset lists that help you pinpoint works of drama, poetry, music, and even banned books; a factoids section; and links to similar lists on other sites. It is also interesting to note that almost 500 books from the original 1000 list have been made into movies (links to the Internet Movie Database not provided).

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

Call for Papers

SLA Baltimore 2006: *Where Tradition and Transformation Converge*

SLA is accepting papers for presentation at its Annual Conference June 11-14, 2006, in Baltimore, and for publication on its Web site.

The papers will not be formally peer reviewed. Instead, a panel of SLA members will evaluate abstracts of the papers. Authors whose abstracts are accepted will be asked to write the paper.

Papers should be about library science, information management, research, or other issues related to the work of special libraries. Abstracts also will be judged on substance, potential member interest, and relevance to the conference theme (Where Tradition and Transformation Converge) or to the SLA tag line (Connecting People and Information).

Authors need not be in academia, but the author (or at least one co-author) ***must*** be a member of SLA.

Submission Guidelines and Specifications

Full guidelines, including formatting instructions, are online at www.sla.org/baltimore2006/papers.

Deadlines

December 8, 2005 – Abstract due. Submit an abstract of your paper via e-mail to Terri Brooks, at brooks@ici.org. Abstracts should be approximately 250-300 words in length, roughly one page in 12-point text with normal margins. Applicants will be notified of acceptance by January 6, 2006.

May 1, 2006 – Paper due. Submission deadline for the complete paper and copyright assignment to SLA. The copyright assignment form is available online at www.sla.org/documents/conf/copyrightform.html. Please print, complete and mail the copyright assignment to Contributed Papers, SLA, 331 South Patrick Street, Alexandria, VA 22314.

June 11-14, 2006 – Conference presentation. Presentation of papers will occur during the SLA conference in Baltimore.

Minimum Requirements for Acceptance

In addition to the quality and relevance of the proposed paper, it must meet these requirements:

- The abstract has been received by the deadline.
- The author (or a co-author) is a member of SLA. Not a member? You can join online at www.sla.org/join.
- The author (or a co-author) commits to presenting the paper at the Annual Conference.
- The paper has not been published in or submitted to any other publication or conference planning group.
- The author (and any co-authors) also must be willing to sign a copyright assignment that will permit SLA to use the paper in various formats. Accepted papers will be posted on the SLA Web site shortly before the 2006 conference begins.

For examples of papers from SLA's 2005 Annual Conference in Toronto, see www.sla.org/baltimore2006/papers.

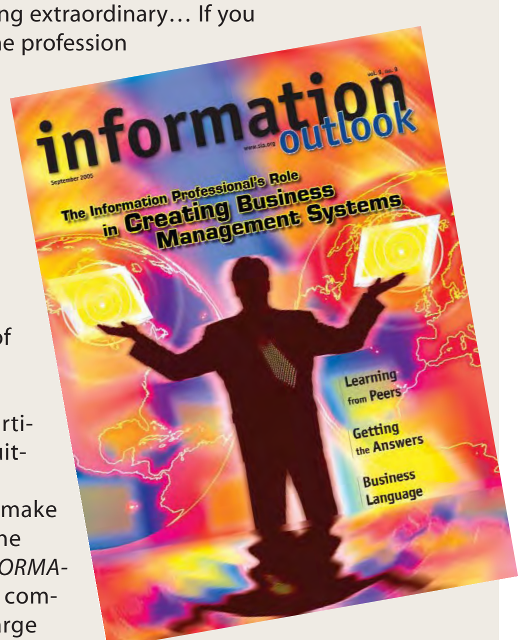
SLA
Connecting People and Information

How to Write for Information Outlook

SLA's monthly magazine is written primarily by and for information professionals. *INFORMATION OUTLOOK* interprets the news and covers trends and issues that affect information professionals in a global environment.

If you know of an interesting improvement in a special library or information center… If you've solved a difficult problem—or prevented one… If you or a colleague have done something extraordinary… If you want to give something back to the profession by sharing your experiences with others… We want to hear from you.

We welcome proposals for articles of interest to information professionals.



Topics

The editorial calendar is a guide for the editorial direction of the magazine. Each issue covers many more topics than those included in the calendar. "Cover article" topics for one issue will be suitable as features in another.

When you propose an article, make sure you can relate the topic to the specific needs of our readers. *INFORMATION OUTLOOK* readers represent companies of all sizes. They work in large libraries with large staffs and as solo librarians in small companies. Their experience ranges from senior professionals to beginners just out of school.

INFORMATION OUTLOOK readers want to read articles about new techniques, new ideas, new trends. They're interested in articles about search engines, knowledge management, international issues, copyright law, technology, innovation, the Internet. They're interested in articles on administration, organization, marketing, and operations.

INFORMATION OUTLOOK readers like case studies. They're interested in growing their organizations and in planning their careers. They want to know what works, and what doesn't work. They want success stories. They want to know how to confront problems and how to avoid them.

Articles should include something new, something different, something important. When the reader is finished, he or she should feel smarter than before.

A note to vendors and service providers

In many cases you may have the best and most current information on a topic. We invite you to share that expertise with our readers, to advance the body of knowledge of the profession. But—we'll insist that your articles do not promote your business or claim that your product or service is the only solution to a given problem. Expanded writers guidelines are at www.sla.org/content/Shop/Information/writingforio/index.cfm.

To submit a proposal…

If you have an idea for an article, please send a proposal to jadams@sla.org outlining the article and your qualifications for writing it. A paragraph or two and a few bullet points will suffice. We usually respond in a couple of weeks or less.

Editorial Calendar

Each issue of INFORMATION OUTLOOK includes articles on many more topics than the ones listed here. The calendar is only a general guide for editorial direction. "Cover article" topics for one issue will be suitable as features in another.

Please e-mail article queries and proposals to **jadams@sla.org**. If you are writing for a particular issue, your query should be early enough to allow for writing the article.

Issue	Cover Article	Deadline
March 2006	**Internal Marketing** Possible topics: Using intranets and e-mail, training internal clients, special events, tips for increasing usage, showing return on investment.	Jan. 6, 2006
April 2006	**Competitive intelligence** Possible topics: Ethical approaches, sources of information, analyzing information, adding value.	Feb. 3, 2006
May 2006	**Career development** Possible topics: Professional development, gaining expertise in content areas, résumé writing, interview tactics.	Mar. 3, 2006
June 2006	**Digital information sources** Possible topics: Selection process, RFP writing, maximizing usage.	Apr. 7, 2006
July 2006	**Managing** Possible topics: Planning, budgeting, supervising a staff, purchasing.	May 5, 2006
August 2006	**Knowledge management** Possible topics: KM systems, indexing information, low-budget KM.	June 9, 2006
September 2006	**Internal Marketing** Possible topics: Using intranets and e-mail, training internal clients, special events, tips for increasing usage, showing return on investment.	July 7, 2006
October 2006	**Web searching** Possible topics: Meta directories, using online search engines, the best sites for various content areas.	Aug. 11, 2006
November 2006	**Copyright** Possible topics: Global considerations, permissions, new laws and regulations	Sept. 8, 2006
December 2006	**Managing** Possible topics: Planning, budgeting, supervising a staff, purchasing.	Oct. 6, 2006

Creative Chaos: Innovation in Special Libraries

By Debbie Schachter

One of the most valuable attributes of librarianship is the creation of order – be that systems, structures, or processes. Librarians collect, arrange, make accessible and disseminate information and information materials in all formats – books, text, images, sound files, etc. – for our customers. And our customers expect to be able to access that information or to receive that information packaged or distributed in the most convenient way to them before or when they need it.

As many of you who have worked as special librarians in a variety of businesses and across all industries, order is something that is often apparently lacking in many organizations, such as the very systems and structures that librarians excel at developing and implementing. Even those organizations that may appear on the surface to be well organized are often simply the result of individuals managing to success in spite of the lack of systems. These individual successes usually cannot be sustained over the long term.

Managers, as well as librarians, are responsible for bringing order to the workplace – through the creation of processes and procedures (the standardization of tasks), training, and chain of command/assignment of responsibilities. All of this work, however, is seen as a means to control, rather than to develop, creativity. As individuals in creative, vibrant or small and growing organizations will often tell you, systems and structures are perceived to be stifling. Creativity is often thought to be at odds with structure, but without some sort of organization or structure, the effectiveness of the organization diminishes. This conflict becomes apparent when small organizations grow past a size for it to continue to be effective without the implementation of certain structures.

Too Busy?

Small or developing organizations are often too busy generating ideas and new products or services—and anticipating and responding to client needs—to spend the time to bring structure and extensive order to the workplace. This can be seen in young technology and creative firms. Success leads to growth, which leads to the need for systems, but lack of time limits infrastructure development. Perception of structure as stifling also leads to the resistance to structure, while at the same time inefficiencies and lack of communication between work teams can lead to increasing frustration among employees.

Librarians are not generally seen to be particularly creative, in that the nature of librarianship is to ensure order and access to information for our clients (so they can make informed decisions and greater success of the organization, overall). As librarians and library managers, however, we do show creativity in the way that we continue to meet the changing needs of our users, to address problems, and to ensure we anticipate what and how to use technology today and in the future. The question is how to infuse more of the creativity into libraries and information centers while maintaining the organization that is essential to our success, and the success of those we serve.

The concept of creative chaos is often used to describe the most innovative environments in industry. Creative chaos is the concept of allowing employees freedom from existing order and structure to foster the generation of creative responses to problems and innovations for future services/products. "Chaos refers to the situation when old rules don't apply anymore; chaos is frightening because it breaks systems down…chaos can trigger positive change like nothing else can." (John Scherer, "Why and How Managers Should Invite Chaos into the Workplace," Women in Business, 44(6):9.)

There is a difference, however, between providing a positive creative/innovative environment and existing within a truly chaotic one. Creative chaos suggests the need to break down traditional barriers and to allow new innovative responses to work processes, new products and services, and new ways of managing workflow. Communication and cross-departmental relationships are essential components of this change.

'Chaos' in Libraries

In a library setting, most would agree that "chaos" would be entirely unproductive and unhelpful to our customers. Re-examining structures and work processes, or allowing individuals the freedom to suggest and generate new ways of doing work, however, is productive. Opening up all existing activities and roles for reinterpretation is, at the same time, both frightening and exhilarating; but if done with the understanding and buy-in from staff, amazing changes can occur.

For example, when you begin your strategic planning activities, involve individuals who may not have been involved before. Make it understood that no previous expectations will be held as sacrosanct. Help your staff and others associated with

Debbie Schachter has a master's degree in library science and a master's degree in business administration. She is the associate executive director of the Jewish Family Service Agency in Vancouver, British Columbia, where she is responsible for financial management, human resources, database and IT systems, and grant application management. Schachter has more than 15 years' experience in management and supervision, technology planning and support, in a variety of nonprofit and for-profit settings. She can be reached at dschachter@jfsa.ca.

your department (your supervisors or colleague managers) to understand that you are not talking about throwing out the old, but of opening channels to creativity and innovation by challenging all existing assumptions.

Provide each employee with the time to re-examine what they do and encourage them to try new methods or creative new relationships to accomplish existing/new tasks. Even if it is not practical to make wholesale changes to what and how you do business, accessing the energy of each employee will bring about surprising results, in increasing efficiency or coming up with new ideas for services to customers.

Other ways of developing some level of creative chaos includes setting new and high goals for the library. To achieve these goals, employees may suggest new services, processes, responses to problems that have not been part of traditional manager/supervisor ideas. Employees may also suggest new ways of collaborating with other departments, new team structure or service delivery to previously unattained clients, in response to these new goals, or due to the freedom from existing work structures. Try to collaborate with other managers and teams in making your changes. If your efforts within the library or information centre can create a groundswell of change, your organization will benefit from it.

Naturally, employees will feel threatened by change, and those with some degree of real or perceived power or authority will feel threatened more than others. This process is about empowering, not undermining, so conveying that message in words and actions to all employees is essential. The bottom line for the library or information centre will still be to serve its clients, but the means of doing so may change.

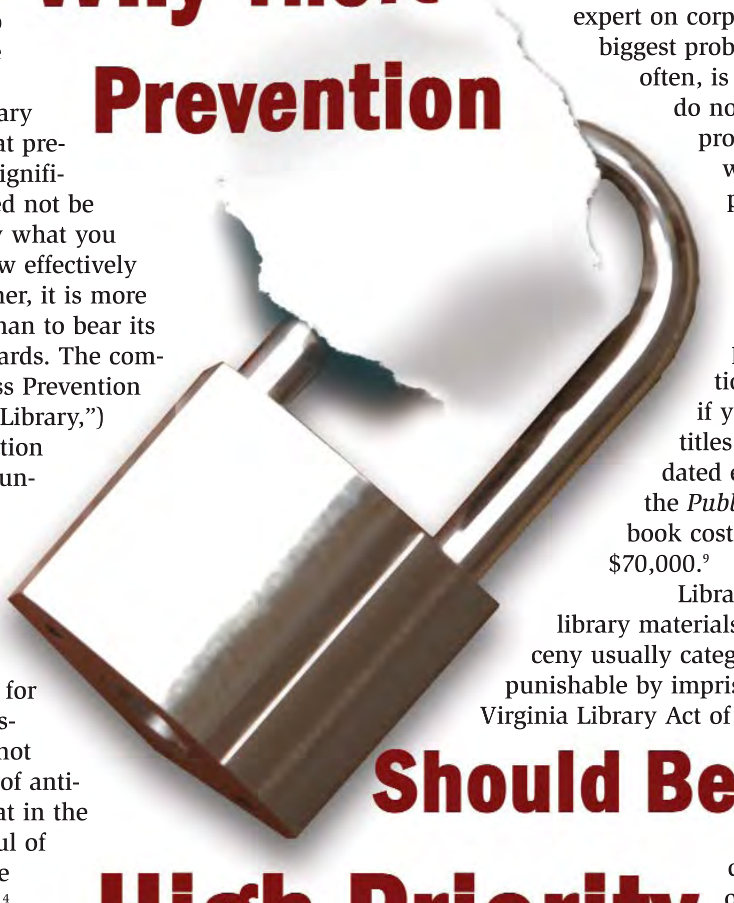
Reinvigorating the library and information services, particularly in larger special library settings, is an important ongoing goal for the library manager. Periodically, shaking up the status quo, allowing employees to question everything, and empowering them to provide new solutions or innovations, is an essential part of your job as a librarian and a manager. Even when workflow and services seem to be providing the results you need, think about what should be coming next. Technology changes, user expectations, and the velocity of change in business environments mean we can't wait to correct problems but we must foster environment that is responsive to change before it is imposed upon us. A little bit of creative chaos may be just the thing to trigger positive change and a prevailing learning environment, throughout your organization.

LOSS PREVENTION STRATEGIES

for the 21st Century LIBRARY

Why Theft Prevention Should Be High Priority

By Judith Gelernter, CIPM [1]



Part 1

Theft prevention should top the list for librarians who have physical collections, because theft causes a huge loss in library time, resources, and money that prevention measures can reduce significantly. Anti-theft measures need not be expensive.[2] It is not necessarily what you spend that reduces loss but how effectively you channel your efforts. Further, it is more cost-effective to prevent theft than to bear its consequences and react afterwards. The companion article to this one ("Loss Prevention Strategies for the 21st-Century Library,") presents a range of loss prevention strategies in use around the country from which you can select according to your particular library situation.

If yours is like most libraries, you don't do inventory regularly, so you may not realize the extent of your need for anti-theft measures.[3] Our professional journals probably have not alerted you to the significance of anti-theft measures either, given that in the library literature, only a handful of major articles on the topic have appeared in the past five years.[4]

The philosophy of some library personnel seems to be that talking about internal anti-theft or loss prevention techniques with outsiders weakens their effectiveness. In extreme cases, libraries and archives have even been known to deny that a theft has taken place lest they be considered an easy target or lose potential donations or grants.

Whether or not library loss is acknowledged, the sad fact is that theft is rampant. Consider what this means in terms of daily operations. Your library is a pool of resources. You and your staff pour in quality materials and effort to select, process, shelve, and advertise resources to your users. At the same time, although at a slower rate, those resources are leaking out. Some are irreplaceable.

What is typically done in the library to handle the loss? Nothing. The reasons: anti-theft practices spoil the friendly atmosphere,[5] are too costly, or are simply not worthwhile because, well, thievery is inevitable. A few years ago American Libraries published a satire with some improbable solutions, such as the creation of "dummy books out of a gummy substance…; the gum melts under human contact and sticks the Book Thief's hands together."[6] Some library administrations believe that anti-theft measures are undemocratic and that we jeopardize everyone's rights when we attempt to enforce security. The truth is exactly the opposite. We enforce security to ensure the rights of the majority to the library's full collection. One expert on corporate security said, "The biggest problem, and the one we see most often, is that most corporate managers do not even know if they have a problem. Worse, many do not even want to know that they have a problem."[7]

The average cost in damages can only be estimated. A 1999 estimate suggests that libraries lose as much as 3 percent of their book collections each year.[8] This means that if your collection includes 50,000 titles and you accept the possibly dated estimate of $44.65 which was the *Publisher's Weekly* replacement book cost, your loss each year is about $70,000.[9]

Library theft is a crime. Stealing library materials is a form of misdemeanor larceny usually categorized as shoplifting. It may be punishable by imprisonment or fine, or both. The Virginia Library Act of 1975, an adaptation of the Virginia Shoplifting Statute of 1958, contains provisions that make willful concealment of library material a crime and that protect a library or archival employee from civil prosecution for detention of a patron when there is "probable cause"—in this case, witnessing the stealing attempt.[10] A draft of proposed legislation to provide libraries and their employees with legal protection to allow them freedom to ensure security for their collections is found in Appendix II of the ACRL "Guidelines Regarding Thefts in Libraries."

Consider this a gentle wake-up call. Library theft (1) costs your organization big bucks and (2) is illegal. Ignoring it virtually ensures that it will continue at the same rate, at least. The good news is that significant savings are possible if the problem is addressed.

Part 2

High-profile theft is the stuff of cinema. Perhaps you enjoyed the jewel theft in "Topkapi" (1964) or the art heist in "The Thomas Crown Affair" (1968, 1999). But let's keep such theft on the silver screen and away from our doorsteps by protecting the integrity of our library collections.

Why steal from a library, of all places, where you can use what you want free of charge? Some psychologists say petty theft may be committed simply for the thrill.[1] In this article, I explore the reasons for theft in libraries, as well as procedures and devices to help libraries hold on to their collections. If the companion article ("Why Theft Prevention Should Be a High Priority") is a call to action, this article describes steps that can be taken, especially ways to match theft types to anti-theft measures to arrive at effective solutions.[2]

Libraries are at risk of losing inventory. Risk is defined as the product of vulnerability (to theft and disaster) and likelihood (that a theft or disaster will occur). Libraries face threats from fire and flood and other disasters; here, I address only threats from mutilation and theft. Many libraries have disaster plans, but remarkably few plan for the much more common occurrence of theft.[3]

In Part I, I discuss a few types of theft and human damage to library collections. In Part II, I offer strategies to forestall theft by lessening opportunities for secrecy, warning about consequences, and regulating the use of items, checkout procedures, and exit portals. These strategies represent levels of anti-theft rigor, from mild (observation and record-keeping) to strong (regulation and screening).[4] In Part III, I suggest ways to help a library decide what measures to adopt and how much to spend. Recognizing that no measures will protect perfectly, in Part IV, I suggest ways to recover stolen items. Appendix A considers features of electronic article surveillance (EAS) systems; Appendix B lists some anti-theft device vendors.

These strategies draw on talks with librarians and security personnel, advice in general security and library literature, a security seminar sponsored by the International Foundation for Cultural Property Protection, and my years of experience as a library director. To preserve the security of individual libraries, I do not disclose which methods are in use at which libraries. I present a range of possibilities, because different measures are appropriate for different user groups, different size collections, and different budgets.[5]

I. Some Types of Theft and Human Damage to Collections

The *Cultural Property Protection Manual* reports that more than 70 percent of losses involve employees.[6] This statistic does not imply that many people are involved, only that one or two individuals can be responsible for a lot of damage.

Circumstances smooth the way for insider theft. Staff might have the opportunity to sneak materials home outside working hours or take newly acquired books before they have been cataloged. The attitude of directors, who may not want to believe that a trusted staff member could possibly be guilty, may also play a role in the prevalence of insider theft. And just as staff and volunteers have a higher than average interest in a library's collection, so, too, might a frequent visitor. A researcher who is familiar with a library's collection might pose more of a threat than an infrequent visitor.[7]

Outsiders may try to cover their tracks. One might take today's newspaper and replace it with last month's. Another might take a book from the shelves and remove library markings, perhaps replacing the book with another title to fill the shelf space. Might this "game" give someone a thrill?

High school or college students might not want to own a library book. A few are content to tear out a chapter for help in writing a research paper. Others underline passages to study for an exam, then return the marked-up book.

Anyone can forget to return an item, even after receiving an overdue notice, but ignoring repeated notices without contacting the library to renew turns delinquency into a form of theft. Finally, some library losses can be chalked up to careless mis-shelving.

II. Loss Prevention Measures

Observation

Most people steal behind the mask of secrecy; this section suggests how the library can see behind that mask. Included here are ways staff can be more aware of each other and of patrons in unattended reading areas and stacks, as well as suggestions to guards who oversee everyone and to managers who verify that security is in place.

A library should check record and references of a candidate before hiring.[8] Some suggest that staff should be loosely monitored to spot the person who develops a particular collecting interest, appears to confuse records deliberately, or seems consistently to mis-shelve materials. An employee who is aware of another's inappropriate activities may consider reporting the activities through an anonymous telephone number such as 1-800-45THEFT.

The library can use various means to vet potential users before conferring library privileges. Some libraries require two written forms of identification before issuing a library card. One research library publicly announces on its Web site that it requires a letter of application along with two letters of reference before it will grant reader privileges.

The layout of the library determines what the staff will see. Crime Protection Through Environmental Design (CPTED) has been used for decades to open sight lines for observation and to protect against secreting inventory. However, what is considered optimal differs for every situation, so there is no single solution.[9] In a library setting, CPTED might entail organizing collections to maximize staff's ability to monitor patron use and redesigning spaces to control the flow of activities.

The Cultural Property Protection Manual maintains that minimum security includes video surveillance, a panic signal, perimeter alarms, and possibly internal alarms on rare-item storage.[10] Library security experts add, in the Library Administration and Management Association (LAMA) *Security Guidelines Document*, that alarm systems should be hardwired in preference to wireless whenever possible, and that a building should have overlapping security protection and/or a backup alarm, motion detection sensors, microdot tags or radio frequency (RF) labels, and closed circuit television (CCTV) monitoring.[11]

This is a stronger prescription than most libraries can afford. The LAMA document authors admit that small libraries

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may find it difficult to comply with some of these suggestions and urge them to follow the spirit of the guidelines by designating an individual to be responsible for security in addition to regular duties. In any size institution, staff can be encouraged to be more vigilant if their job descriptions are rewritten to include monitoring collections.

Surveillance can be accomplished with the help of mirrors or cameras with live monitors, or by guards, and can be expedited by optimal space layout. Mirrors are not very effective, although they are better than nothing. A better choice would be a CCTV system consisting of a camera and a digital video recorder (DVR). A DVR is compatible with most kinds of cameras. Choose a camera on the basis of factors such as location, lighting, coverage, and image quality. If budget limits you to a single camera, aim it the main entrance; if you have two cameras, aim the second camera at the staff entrance. The most efficient cameras record on real-time videotape only when an alarm is set off. It is critical to check little-used devices regularly, so they don't fail when they are needed. cVideo Inc. makes a self-diagnostic digital recorder that uses an additional software program to report every day, or as often as needed, whether the device is working properly.

Libraries are advised to avoid electronic "scarecrows." Dummy cameras are, of course, less expensive than working models and are used as a deterrent. However, if something were to happen to an individual standing in front of a dummy device, she could claim that she assumed that the camera offered some kind of protection. The library could be liable for damages.

Using guards is the most expensive and probably the most effective way to keep people honest.[12] However, uniformed security guards are a luxury for libraries, as are the plainclothes guards who are hired seasonally in bookstores. As an alternative, it would seem natural for a librarian to approach patrons who are browsing and ask obligingly whether she might be of help, thus giving herself an opportunity to observe their behavior.

It falls to management to ensure that the combination of security staff and devices is doing the job. Walk through the library occasionally to make sure it is being protected during and after hours; vary the walk-through to assess the security level at different times.

Record-Keeping

If observation entails watching what is happening, retaining circulation data entails recording what happened. Libraries also keep records by marking the items themselves and recording them in the catalog.

Pristine items newly arrived from the distributor are especially vulnerable to insider theft. Management should direct that new items be marked immediately as library property. For example, an item could be stamped with the library logo and titled, barcoded, and entered into the catalog immediately with a simple author-title record. This procedure could be reinforced by a checkout policy in which employees are not permitted to check back in items they have checked out for their own use.

Strategically placed marks that cannot be easily obliterated protect against outsider theft. The library logo and address should be placed so that they are difficult to obscure, for example, stamped across the top edges of the pages. At least one barcode should be on the inside front or back cover of the book, where it cannot be easily removed. Too many libraries place the barcode on the book jacket (which can be removed) or an inside page (which can be ripped out).

Even materials that are too precious for bar coding and stamping must be marked so the library can prove ownership. A low-tech method would be to note in the catalog record identifying features such as foxing patches, font irregularities, or publication oddities. If no identifying features exist, you can create some. The Rare Book and Manuscript Section's Security Committee recommends penciling in a capital letter in each detachable part of a rare item or making other such marks.[13] A high-tech method would be to attach a microdot tag. The dot is the size of a grain of sand and has a unique number etched into it.

Does the library have all the items that are listed in its catalog? An occasional inventory will ensure that the catalog reflects what is actually on the shelves.

Libraries should save circulation records to identify borrowers who might have damaged an item. Some libraries require patrons to fill out request slips noting the topic of research along with the item viewed; these, too, should be saved. That way, if damage is discovered later, use of the item can be tracked. Some libraries weigh each manuscript precisely before and after it is consulted to confirm that nothing has been extracted.

Warning

Watching and recording are passive ways to make individuals aware that their behavior will be noticed and noted; warning about the consequences of misuse of library materials may be a more potent deterrent. Warning may include reminding staff about a policy to report suspicious activity and to punish offenders.

Historically, warnings have been used to guilt people into following the law. A warning might be written into a medieval manuscript to protect the manuscript from thieves. The manuscript defended itself, so to speak, with a curse on the one who dared to deface or steal it, dooming the offender to "damnation with the traitor Judas" or some such punishment.[14] Today, warning about consequences might weigh on the conscience and help instill law-abiding behavior. Weight on the conscience coupled with weight on the wallet in the form of overdue fines may be even more persuasive.

Awareness of a theft policy serves as a warning. Generic theft policy statements for an organization can be found in *Loss Prevention and Security Procedures* and *The Cultural Property Protection Manual*.[15] Any theft policy should be approved by management and reviewed by legal counsel. Such a policy should define theft and outline how management will try to prevent it; explain how theft will be reported, investigated, and documented; and state the circumstances under which a person may be detained or disciplined.

Management's anti-theft stance can be made known by giving each employee a copy of the theft policy. Posters mounted in high-traffic areas in the library will remind visitors of the consequences of theft.[16] A written theft policy pro-

tects the staff. In a tense situation, a staff member could hand a rule-breaker a copy of the library policy. Those who do not honor the rules must leave. Those who do not leave are then trespassing, and staff may be justified in calling security or the police.

An investigation into suspicious activity might serve as a deterrent. When an individual is suspected, a designated staff member should determine the facts about an incident's time sequence and who was involved. The individual might be questioned but must provide information freely to maintain the legality of the proceeding. Facts uncovered should be set in writing.[17] Larger facilities might consider purchasing software dedicated to incident tracking, such as IRIMS Incident Management Software by PPM.

Any action taken at the time of an incident must be based on probable cause; that is, someone must have actually seen the theft taking place. A person who witnessed a violation and informed the supervisor must be a trusted employee, not a bystander unknown to the supervisor. A police official should be responsible for action. Consider getting acquainted with a local police official now, so that in the event of an emergency, your library will be a known quantity.

Subliminal audio is being tested in retail outfits and in the military. Classical or romantic music masks messages such as "Stealing is wrong" or "Book thieves will be prosecuted." Proponents claim that these messages filter into the minds of potential thieves and steer them away from theft. However, subliminal audio is not viable in most libraries, where music would interfere with reading and study.[18]

Punishment is a proven deterrent. One security official reported that after his public library began to prosecute for stealing, the number of thefts dropped from one or two each week to about one every two months.[19] Even though following through with disciplinary action may serve as a deterrent, threatening disciplinary action and not following through may weaken the library's position. With threats, as with dummy cameras, libraries are advised to avoid scarecrows.

Prevention

The most rigorous anti-theft measures make it difficult for users to leave the premises unless an item has been checked out. Some preventive measures regulate the use of materials by requiring patrons to ask for certain items at the circulation desk. Other preventive measures regulate access by bag check at an exit or by EAS alarm. Measures are most consistently effective when employees are alerted to possible difficulties and how to handle them. Training may consist of an overview of internal security policy or a more formal workshop with a company such as Layne Consultants, International.

New acquisitions, including audio CDs and best-sellers, are particularly desirable and, hence, particularly vulnerable. These might be regulated by removing them from browsing shelves altogether. Display only empty jewel cases or book jackets, so that a visitor must request items at the circulation desk. Some libraries require visitors to leave an ID at the circulation desk while they examine a manuscript or even a newspaper. A small amount of extra work for staff can make a big difference in reducing theft.

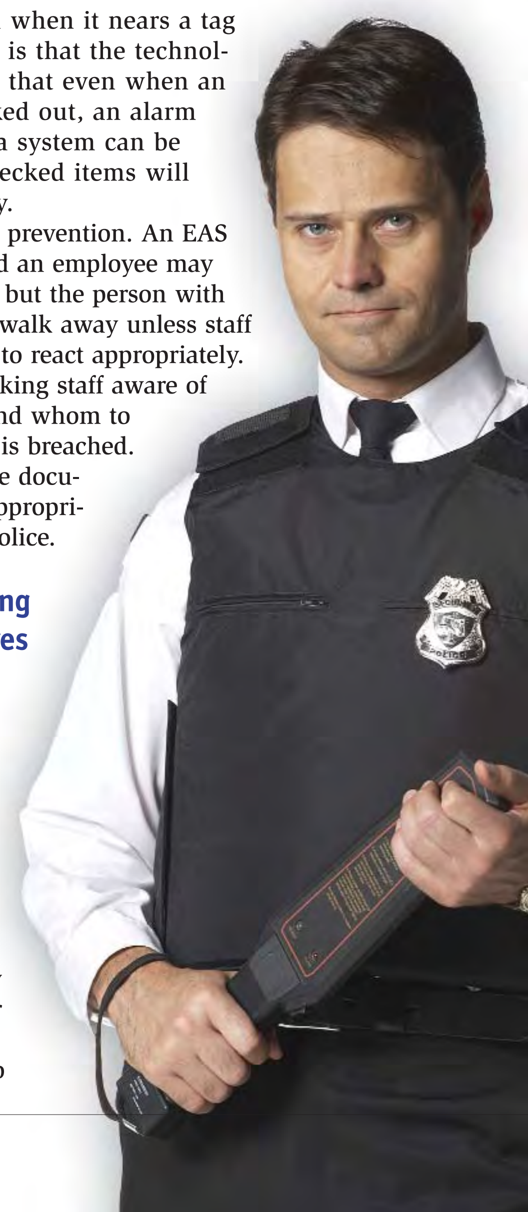
Valuable materials should be withdrawn from open shelves and confined to limited access areas. On the transfer of materials, see the ACRL Web publication on the "Selection of General Collection Materials for Transfer to Special Collections."[20] Digitization might be the way to go for the few rare materials that must be protected from any handling.

A person who has slipped library materials into a backpack should not be able to leave the premises with those materials. A guard stationed near the exit to check bags should be able to spot library items that have not been checked out. An item with an EAS tag that has not been checked out will set off an alarm.

Controlled access is a preventive measure. In the simplest circumstance, only authorized individuals are admitted to a given area at a given time. Perimeter intrusion detection systems prevent after-hours break-ins. Passive infrared detectors sense an intruder's body heat as the person enters or moves around in a protected area. For these area alarms, as with CCTV, proper placement is essential for effective use.

EAS systems work similarly to prevent theft whether the system is electromagnetic (EM), RF, or radio frequency identification (RFID) (see Appendix A for details). An item with an EAS tag that has not been checked out will set off an alarm when it nears a tag reader. The problem is that the technology is unreliable, so that even when an item has been checked out, an alarm might sound. Also, a system can be tricked so that unchecked items will pass through silently.

Training is part of prevention. An EAS alarm may sound and an employee may have probable cause, but the person with library property will walk away unless staff members know how to react appropriately. Training includes making staff aware of the library's policy and whom to contact if that policy is breached. Disruptions should be documented and, when appropriate, reported to the police.



III. Choosing Among Anti-theft Measures

What mix of devices and policies should your library adopt? One approach is to review threats and then choose greater or lesser preventive measures depending on how much risk the library will tolerate. Another approach is to hire a security consultant to review threats and suggest appropriate countermeasures. Either way, anti-theft spending is an investment with the goal to keep the collection full. Whatever measures you choose, don't forget staff security training, one of the most important factors.

Remember, risk encompasses threats and vulnerability to those threats. So the first step in reducing risk is to determine what the threats are. Risk assessment—which involves talking with staff members, surveying the premises, performing spot inventories, and other measures—identifies areas where more security is needed. You will then have quantitative data on which to base decisions and can choose anti-theft measures in response to actual threats. Whatever is implemented must be reassessed after some time to make sure it remains effective. Unsuccessful measures should be discontinued and replaced by other approaches. The risk assessment itself must be updated periodically.

How many anti-theft measures should a library adopt? Libraries with a high tolerance for risk might choose modest observation or record-keeping strategies. Those seeking stronger defenses might choose one guard and one preventive strategy. Those with low tolerance for risk may prefer a range of preventive measures. Ultimately, the more anti-theft measures are implemented, the less vulnerable the library will be. Security experts tend to agree that layers of security are not redundant but rather ensure greater protection.

Those who desire a comprehensive risk assessment and loss prevention plan might hire a consultant. In this as in any field, industry-specific consultants are better because library-specific measures can be combined with general ones for tighter security. The International Foundation for Cultural Property Protection designates the Certified Institutional Protection Specialist (CIPS) and, for cultural settings, the Certified Institutional Property Manager (CIPM).[21] The American Society for Industrial Security includes security professionals in all fields, and designates the Certified Protection Professional (CPP).

How much should your library spend on theft prevention? You can approach the questions analytically by weighing the cost of risk (i.e., all negative occurrences) against the cost of implementing anti-theft measures. Remember in determining the cost of a security device or policy to reckon in the time it takes to install, master, and maintain. Also, include the cost of replacement parts for electronic devices. Calculate an upper limit for loss prevention spending by multiplying collection size by the 3 percent estimated annual loss quoted in the companion article and the $44.65 average cost of a book.[22] If you spend less than this amount on security, you might see a return on investment even in the first year; but generally, loss prevention is a long-term investment, the benefits of which are realized over time. A library is justified in spending triple the expected annual dollar loss amount on security so that, by the fourth year and afterward, it will profit by having a fuller collection.

Beyond libraries, spending on anti-theft devices is widespread. A 2003 national survey of retail store owners around the country reported that 94 percent use burglar alarms, 82 percent use live CCTV, 73 percent digital video, 50 percent observation mirrors, 49 percent uniformed guards, 43 percent electronic and acousto-magnetic security tags, 38 percent RF tags, and 4 percent RFID, to name just a few protection types. For 2004, the surveyed retail store owners planned a 42 percent increase in digital video monitoring, a 20 percent increase in live CCTV, and a 7 percent increase in RFID tags.[24] These corporate anti-theft planning statistics are so startling that one wonders whether libraries would take the theft problem more seriously if they were forced to make a profit.

Why not turn to library security gradually, without devices or spending? A goodwill campaign should help win sympathizers. Publicize a month-long book amnesty during which all undocumented loans may be returned anonymously—no questions asked. That way, when protective measures are implemented, they ought to meet with acceptance and trust.

IV. It Didn't Work. Now What?

It will happen: The determined person will get what he or she is after. But that doesn't necessarily mean that the person will be able to keep what he has taken. A library can prove ownership of a seemingly unmarked manuscript by providing a detailed description from the catalog record that notes irregularities, marks, or a microdot number. Addresses for reporting thefts are listed in the ACRL "Guidelines for the Security of Rare Books, Manuscripts and Other Special Collections."[24] Valuable missing books could be reported to an organization such as the Antiquarian Booksellers' Association of America (www.abaa.org), which will alert its members to the possibility that an item on the market might, in fact, be stolen.

Conclusion

Always assume that a person is innocent—that the witness has erred, the device was faulty, what seemed like thievery was actually an oversight. Because you'll always give your staff and visitors the benefit of the doubt, there's no reason to hold back on anti-theft measures. Although security measures cannot be 100 percent effective, responsible protection will keep a library collection more complete and, therefore, more valuable to generations present and future.

Appendix A

The Anti-Theft Potential of Electronic Article Surveillance

Among the primary types of EAS, acousto-magnetic (AM) is no longer popular in libraries. RF is the least expensive for libraries to implement, followed by EM; RFID currently is about three times the cost of EM.[25] Any of these three systems have a projected life of about 25 years, while the identification tags or targets are expected to last the lifetime of the object to which they are affixed.

The basics of EAS systems are similar. A target secured to an item may look like a tag or barcode, a strip hidden in a book spine, or a "Please rewind" label. The target is read by a detector or scanner within panels (formerly turnstiles) located near library exits. The zone of detection has enlarged over the past few decades. The various EAS systems differ in how the target is turned on or off, the "pick rate" of the systems (that is, how effectively targets are read by detectors), and the detector range. Different tag types follow different standards. Within an EAS type, some tags made by different vendors are interoperable, although detection rates among vendors may vary.

EM systems are dominant in Europe and have been used for decades in U.S. libraries. 3M leads the library market. The EM tag contains magnetic metal that electromagnetic signals travel through to stimulate a response. A tag is active when an item is on the shelf, and it is passed across a magnet to "turn off" the tag at check-out. The tags transmit a unique frequency pattern that triggers an alarm when recognized by the detector's receiver antenna. EM systems eventually become unstable, because over time magnetization weakens.

RF systems require less maintenance and produce fewer false alarms than EM systems. RF is a 30-year-old technology, widely used in the United States and introduced to libraries only about a decade ago by Checkpoint. Each RF tag contains an antenna and a wire capacitor set to a particular frequency. The RF tag must be blocked by a small tab or date due card to allow an item to circulate, or else it will sound an alarm if it nears a detector. The detector antenna, which is usually one pedestal of the entry/exit gate, sends a signal that is read by the tag antenna. The tag response is read by the detector's receiver antenna, which is usually the other pedestal. Acousto-magnetic systems are an advanced form of RF, with a higher detection range and a lower frequency. However, the relative thickness of AM tags makes them impractical for use on CDs and DVDs, and AM has been overtaken in the library market by its RF cousin.

RFID is an innovation in libraries. It has been compared to an item's license plate, and is used for inventory and circulation as well as loss prevention.[26] In fact, 3M offers RFID without a security component. Both the RFID reader/transceiver and the tag/transponder (transmitter + responder) contain an antenna and a chip. The reader uses RF waves to transmit a signal to activate the tag so that it offers up the data stored in the chip. Tags are blank when acquired; the library enters the data needed depending on tag storage capacity: a barcode number only, or title and call number as well as a barcode number. Privacy advocates be reassured: a minimal-information tag, which is essentially the equivalent of the barcode, is available from Checkpoint. The anti-theft capabilities of these tags can be compromised without difficulty, although I will not offend the industry by explaining how. And even when an item has been checked out, an alarm might sound if the checkout had been done carelessly.

The advantage of EM, RF, and RFID rests not in their anti-theft potential but in their ability to increase productivity. Many tags can be read simultaneously so that staff members save time at checkout and check-in. RFID also may be useful for purposes of inventory. But even not counting labor to apply the tags, a batch of tags plus equipment plus ongoing maintenance makes even the moderate RF system expensive. Few libraries can afford to outsource the tag-affixing process that would allow the entire collection to be tagged at once. Instead, some tag piecemeal when an item is requested from the stacks, while others organize "tag teams" to apply tags and enter information. A few distributors provide "source tagging" to books so that materials arrive at the library with tags already applied. Circulation and inventory potential of the tags notwithstanding, barcodes will not be replaced any time soon.

Appendix B

Some Vendors of Library Security Devices

The following list constitutes neither an endorsement of the companies that appear on it nor a censure of those omitted. The Security Industry Association sponsors an annual International Security East-West Conference that showcases various companies' security devices.

When selecting equipment, try to avoid proprietary devices that might be difficult to service, and insist on a warranty for installation and parts. Devices typically are installed by the vendor or by a third-party contractor. A library is within its rights to check the references of the vendor or contractor and to request evidence that vendor personnel have completed a police record check before the library grants access.

Electronic Article Surveillance (EAS)
3M
Bibliotheca
Checkpoint Systems
Libramation
Microdata International (data dot technology)
SenTech EAS
Sentry Technology Corporation
ST Logitrack
Tech Logic
VTLS

Security Devices and Systems
ADT (CCTV, cameras)
BEI Security (intrusion detection systems)
cVideo
Exavera (RFID badges and tags)
First Alert
Honeywell
Idesco (access cards)
PPM (IRIMS software)
Skyway Security (CCTV and video capture board)
Vernon Library Supplies (dummy devices)

Endnotes - Part 1

[1] CIPM (Certified Institutional Property Manager) is a security certification designated by the International Foundation for Cultural Property Protection.

[2] Take, for example, a University of Kentucky library that saw the need for and implemented new anti-theft measures. The University of Kentucky study concludes, "[I]t appears that significant reduction of book loss can be accomplished without the library having to spend a great deal of money," p. 283 of Greenwood and McKean, "Effective Measurement and Reduction of Book Loss," Journal of Academic Librarianship 11 (5) (1985): 275–283.

[3] Kristen M. Janus, "Securing Our History," Library and Archival Security 17 (1) (2001): 3–15. Janus warns libraries to be aware of theft and keep inventories up to date.

[4] This article considers security techniques for physical collections only, in contrast to related articles that consider security of digital data as well. Significant articles sharing the focus of this one and published within the past five years include Richard W. Boss, "Security Technologies for Libraries: Policy Concerns and a Survey of Available Products," Library Technology Reports 35 (3) (May/June 1999): 271–356; Abigail Leab Martin, "The Saying and the Doing: Part I—The Literature and Reality of Theft Prevention Measures in U.S. Archives," Library and Archival Security 15 (2) (2000): 27–73; Martin, "The Saying and the Doing: Part II—The Real World and the Future," Library and Archival Security 16 (1) (2000): 7–45; ACRL "Guidelines Regarding Thefts in Libraries," College and Research Library News 64 (6) (June 2003): 402–407; and ACRL "Guidelines for the Security of Rare Books, Manuscripts, and Other Special Collections" at www.ala.org/ala/acrl/acrlstandards/guidelinessecurity.htm (accessed Nov. 1, 2004).
Important, up-to-date information can be found outside the library literature in security journals such as Security Management, Access Control and Security Systems and ST&D (Security, Technology and Design). See also Robert James Fischer and Richard Janoski, Loss Prevention and Security Procedures: Practical Applications for Contemporary Problems, 2000.

[5] Jodi Booth describes the mutilation of materials at the University of Idaho Library and how the library is determined, nonetheless, to "hold true to a friendly, trusting atmosphere." Booth, "Save the Libraries! PNLA Quarterly 67 (2) (Winter 2003): 14–20.

[6] Paul Wartenberg satirizes anti-theft measures in "The Pros and Cons of Squelching Library Theft: All It Takes Is a Little Imagination to Solve this Endemic Problem—But at a Price," American Libraries 31 (2) (February 2000): 48–49.

[7] James F. Broder, Risk Analysis and the Security Survey, 2000, 41–42.

[8] The 3 percent figure is from the May/June 1999 issue of Library Technology Reports. op. cit.

[9] A collection size/annual book percentage loss chart is found on p. 26 of Michael J. Stack, "Library Theft Detection Systems—Future Trends and Present Strategies," Library and Archival Security 14 (2) (1998): 25–37.

[10] Details are from the section called Legal Protection, pp. 98–106, in Timothy Walch's Chapter 6 of Lawrence J. Fennelly, ed., Museum, Archive and Library Security, Boston, 1983.

Endnotes - Part 2

[1] See Will Cupchik, Why Honest People Shoplift or Commit Other Acts of Theft: Assessment and Treatment of "Atypical Theft Offenders"—A Comprehensive Resource for Professionals and Laypersons, 2002.

[2] "Anti-theft" and "loss prevention" are used interchangeably in this article. The anti-theft prescription format of the article is unusual. It is closest to "Guidelines Regarding Thefts in Libraries" by the Security Committee of ACRL's Rare Books and Manuscripts Division, College and Research Library News 64 (4) (June 2003): 402–407. Richard W. Boss provides a thorough study of the topic in "Security Technologies for Libraries: Policy Concerns and a Survey of Available Products," Library Technology Reports 35 (3) (May/June 1999): 271–356. Of the recent studies that address security, many present strategies in current use without discussing which methods are most effective. For example, George J. Soete with Glen Zimmerman, Management of Library Security: A SPEC Kit, ARL Washington, D.C., July 1999, presents a variety of model security plans, but readers are left to figure out which is preferable and why. Bruce Sherman's Case Studies in Library Security, 2002, presents various security cases (a few of which consider theft) in a single public library district and describes how that district met the challenge. Each case is followed by discussion questions, leaving it to the reader to determine whether the scenario was handled in the optimal way.

[3] Soete with Zimmerman, Management of Library Security, pp. 3–4, notes that, of the libraries that responded to the survey, only 40 percent had ever developed a security plan.

[4] The concept of matching level of security to level of risk comes from Carl Young, The Science of Security...And the Fundamentals of Risk Mitigation, unpublished manuscript.

[5] ACRL "Guidelines Regarding Thefts in Libraries." Loss prevention techniques are also nestled in the LAMA division-sponsored Library Security Guidelines Document, 2001, prepared by the Security Guidelines Subcommittee of the BES Safety and Security of Library Buildings Committee: Merri Hartse (chair), Sylvie Bouchard-Estrella, Henry DuBois, Susan Hildreth, and Gregor Trinkaus-Randall. www.ala.org/ala/lama/lamapublications/librarysecurity.htm (accessed Nov. 1, 2004). Also see ACRL "Guidelines for the Security of Rare Books, Manuscripts, and Other Special Collections," 1999, www.ala.org/ala/acrl/acrlstandards/guidelinessecurity.htm (accessed Nov. 1, 2004).

[6] The 70 % statistic is reported in Stevan P. Layne, The Cultural Property Protection Manual: A "How To" Guide for Managers/Administrators, 2nd edition, Denver, Colorado: Layne Consultants International, 2002, p. 40.

[7] Abigail Leab Martin discusses how this point is treated in the library literature. Martin, "The Saying and the Doing: The Literature and Reality of Theft Prevention Measures in U.S. Archives—Part I," Library and Archival Security 15 (2) (2000): 39.

[8] See Appendix B: Staff Pre-Employment Screening Guidelines in the LAMA Library Security Guidelines Document. The LAMA document offers a "safe" way to inquire whether a previous employer would consider rehiring the candidate.

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[11] LAMA Library Security Guidelines Document, 2001. Security alarms and electronics are covered in section 8, and recommendations are extracted from points 8.2, 8.5, 8.6, 8.7, and 8.9.

[12] *The Cultural Property Protection Manual* includes a discussion of steps to be followed in selecting security officers (p. 31) and a sample set of guard orders for the security officer on duty (p. 33).

[13] ACRL standards on the ALA Web site. See Appendix I of "Guidelines for Marking Books, Manuscripts and Other Special Collections Materials."

[14] Rebecca L. Lubas, "The Evolution of Bibliographic Control of Maps," in Historical Aspects of Cataloging and Classification, Martin D. Joachim, ed., 2003, p. 438.

[15] Sample theft policy in Fischer and Janoski, Loss Prevention and Security Procedures: Practical Applications for Contemporary Problems, p. 87, and in The Cultural Property Protection Manual, p. 41.

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[21] The International Foundation for Cultural Property Protection is on the Web at www.ifcpp.com; the American Society for Industrial Security is at www.asisonline.org (both accessed Nov. 1, 2004).

[22] A collection size/annual book percentage loss chart is found on p. 26 of Michael J. Stack, "Library Theft Detection Systems—Future Trends and Present Strategies," Library and Archival Security 14 (2) (1998): 25–37.

[23] 2003 National Retail Security Survey Final Report, University of Florida, Richard C. Hollinger and Lynn Langton, pp. 23–24.

[24] See Appendix II of ACRL "Guidelines for the Security of Rare Books, Manuscripts, and Other Special Collections."

[25] Richard Boss, "Security Technologies for Libraries," offers an excellent overview of these products, with photographs of different system components. For a more current selection, visit the Web sites of 3M and Checkpoint Systems.

[26] Diane Marie Ward has written on RFID for Library and Archival Security 19 (1) (Spring 2004): 7-12 and for Computers in Libraries 24 (3) (March 2004): 19–20, 22–24. See also Vikas Mehta et al., "Radio Detection System for Information Handling," DESIDOC Bulletin of Information Technology 24 (4) (July 2004): 19–23.

Face Time

The Power of *Person-to-Person* Marketing

By Janet Peros

In an age when our clients increasingly reach us through virtual means—via phone, e-mail, instant messaging, or a virtual reference desk—we often overlook the importance of face-to-face contact. Face-to-face contact demands an immediate response. Along with that immediate response often comes instant gratification. There is no hesitation or awkward waiting period between leaving a message or sending an e-mail and waiting for a response. Think of how great it would be if we could share all our information or answer all our questions just by walking down the hall. We cannot handle all our interactions in this manner, of course, but we need to realize we can handle many of them this way and take advantage of these opportunities whenever possible.

Just as our clients meet with their clients over a lunch or dinner to discuss the particulars of a deal and create a rapport, we librarians need to remind our clients of our existence. We need to put a face to a name and show them the services we can provide in addition to answering their e-mail and phone call requests. I am frequently amazed at what we can accomplish and how attitudes can rapidly change when we make the effort to go to our clients' offices and speak with them in person. Why make the effort to do this? Will it improve our clients' view of us? Will it benefit our relationship with our clients? Experience has shown that it can.

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In Person

Aside from visiting the water cooler or restroom, how often do we get out of our chairs in a day? Sometimes we feel we need to stretch our legs or rest our eyes from the glare of our computer screens. What better time to go hand-deliver those documents that were about to go into the interoffice mail? Oftentimes by delivering in person, we get a smile or a thank you. We may even reap the reward of another research request. By visiting clients in person, we are telling them three things:

1. You Are My Priority. There are many ways to assure people they are a priority. One great way is by taking the time to go meet with them in person. Friends and family may often complain that we e-mail or call—but we don't visit. Clients feel the same way. Taking the time to visit them in their offices makes them feel they are worthy of our time and that the library/information center is doing a good job. It probably won't hurt in terms of job security either.

2. This Is What I Can Do for You. We are constantly being told to market library services and make our clients aware of what we do. We create Web sites, brochures, bulletins, and blogs to achieve this. We can achieve the same goals through face-to-face interactions. We should take the time to hand-deliver research results. This way, we can point out specific excerpts and give our highlighters and sticky-notes a rest. This will also help to clarify points that may get lost in translation via phone or e-mail. Our clients will certainly value this personal service and prefer it to receiving a data dump, whether it is hundreds of pages in a binder or a large PDF attachment. By having a conversation with clients, we can make them aware of library services they may not be familiar with. Some clients may not be aware they can get company information, news, historical stock quotes, or whatever else they may need from the library. They can also learn how to get this information on their own with the library's guidance. This may provide the boost in business that we all need.

3. I Am Receptive and Open to Your Comments or Suggestions. Often, when we telephone or e-mail clients, they may feel overwhelmed by all the information we are trying to get across. They may feel their questions or suggestions are going unheard. But by visiting someone we are sending the message that we are there to have a conversation—a give-and-take of ideas. This should allow our clients to feel relaxed and free to offer their opinions and to ask for advice.

Walking the Halls

Sometimes we don't need a reason to visit our clients' offices other than to drop in and see how they are doing. At our firm, we call this "walking the halls." Admittedly, this is most often done to retrieve books that have been missing from the library for a long time. We often try to throw in an incentive for returning a long-lost book, such as a tchotchke or a cookie (more on this later with National

Library Week). But we can also walk the halls for the sole purpose of walking the halls (if it sounds Zen-like—it is).

Clients may see us and be reminded of a research request they were about to make. They may have a follow-up request to something we recently did for them. This is a chance to follow up as well and to see if their most recent requests were fulfilled in a satisfactory manner. If so, great. If not, we can allow them to vent and complain if they want to. We can assure them that every effort will be made to address their needs in the future. This will help build a loyal relationship because they will see how responsive we are and will come back to us when they have other requests. They will recommend our service to others and start building a stronger relationship with the library.

Even when we aren't consciously walking the halls, we can run into clients in the hall, elevator, or break room. The same rules should apply. We can follow up on any recent requests with a friendly, "How were those articles/cases/statistics I sent you?" This open-ended question will allow clients to answer either positively or negatively and thus give us a chance to respond appropriately. As Terri Lawrence discussed in her presentation "Partnering for Shared Success," we need to be ready with our "elevator speech" at all times. This assures that we are not caught off-guard with no reply when we unexpectedly run into clients in the elevator and they ask, "So what's new in the library?" Lawrence recommends having a uniform reply to this question that we can share with our entire staff. Even if we don't take it this far, it is good to discuss this with staff or co-workers to make sure that we are not giving conflicting information. We should solicit feedback from our clients and make an honest effort to comply with their requests. We should be ready to tell them about new acquisitions, both print and electronic, that are appropriate for their practice or department. We should be ready to let them know about upcoming training seminars or special events at the library. And, of course, we should be ready to ask them, "What would YOU like to see at the library?"

Not in Person?

We cannot always see people in person. They may work too far away or often be out of the office. In this case, phone contact can still be preferable to e-mail. Hearing a human voice with its emotions and intonations can be a close second to having someone meet with us face-to-face. Dialogue can also be clearer and easier with a brief phone call than with a multitude of back-and-forth e-mails.

Increasingly, the only contact we have with some or all of our clients is electronic. When this is the case, we can still follow up a request with a friendly e-mail asking if they need additional material. If we are mindful of how we compose our e-mail and convey a professional and enthusiastic manner, we can still get clients to open up and respond. We can achieve a rapport comparable to one we would achieve in person.

Make Every Week Library Week

Each April, we celebrate National Library Week at our firm. This year, we created a special bulletin, sponsored a trivia quiz on famous librarians, and hosted special vendor training sessions throughout the week. In addition, there was no shortage of cookies and other treats available in the library throughout the week. The one activity we planned that stands out in my mind was what we called "The Great Books-for-Cookies Exchange '05." We walked the halls and went to every office offering a cookie for a library book. Our goal was to get back at least some of the books that had walked off the shelves. We achieved that goal—and a lot more. Yes, we had to give some cookies away without getting any books out of the deal. However, we received a number of new research requests, some compliments on the library, and many smiles. We also gave out a keyboard sweep with the firm's name and the library's new slogan. This was just a small, blue, plastic brush to clean keyboards. And yet, people's faces lit up when we came into their offices with a cheerful tone and a gift with no strings attached. It reminded me how important it is to nurture the relationship with our clients. We should never be out of sight and out of mind.

One of the major requirements for being a successful librarian is providing excellent customer service. We shouldn't need the excuse of National Library Week to provide excellent customer service and to do something special for our clients. We can visit folks whenever we have new information on library services or research of interest to them. We can also visit them to deliver research results or anything else we would send via messenger, e-mail, or fax. This is an easy way to stay up to date with client needs and expectations and to develop a personal relationship.

Conclusion

There is no question that virtual reference services can provide quick responses to research requests while achieving important cost and labor savings. But there is more to running an effective and dynamic reference service than just fulfilling electronic requests. Knowing how to anticipate our clients' needs and to share critical information and news of new services effectively are also vital elements in today's fast-paced information environment. These can be best achieved through the development of personal business relationships with our clients—through face-to-face contact that fosters a sense of familiarity and eliminates the barriers that prevent both clients and information professionals from seeking each other out when needed. Consistently reaching out to our clients in a personal, friendly manner is more than just good customer or public relations. It is often the key that opens the door to new opportunities.

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Recruiting Advocates for Information Services

They Are Waiting to be Asked

By Susan S. DiMattia

Essential information services—and the people who deliver them—continue to face tough times. That's not a news flash to anyone reading this article. It's also not an invitation to complacency. There are tools to soften the reality.

Joseph P. Kennedy is credited with crafting the phrase, "When the going gets tough, the tough get going." An Internet search on the phrase yields several interesting twists on the theme. "When the going gets tough"…"the crazies come out"…"the tough go shopping"…"why keep going"…"the tough go blogging." The real question, one person suggested, is "how to keep going even when the going gets tough."

Although some of us might prefer either the shopping or the blogging option, the best philosophy is summed up in the final phrase: How do we keep going? Creating an advocacy campaign is both a useful and satisfying tool under those circumstances.

Advocacy is Not Marketing

Marketing is a close companion to advocacy, but it differs in important ways. Marketing involves identifying unmet needs, producing products and services to meet those needs, and pricing, distributing and promoting those products and services.

Public relations, another "cousin" in the mix, is the business of inducing the public to have understanding for and goodwill toward a person, firm, or institution. A public relations campaign hopes to plant a perception, but doesn't necessarily ask listeners to take action.

Advocacy is the act of pleading or arguing in favor of something, such as a cause, idea, or policy. Advocacy asks the audience to take an action of some kind. This is an important distinction.

Which campaign should come first—marketing or advocacy? If your department's marketing plan is well-constructed

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Strategies for success

In search of advocates:

1. Determine the audience.
2. Have concise, well researched, written, and tested messages.
3. Experiment to find the best way to communicate to each target audience.
4. Train those who will deliver the message—and ensure that there will be clear and consistent messages from all messengers.
5. Decide when a campaign should begin and end. Is there a deadline for action, or is the need for advocates ongoing? Keep the campaign fresh so people will pay attention.
6. Encourage staff creativity. It's a team effort.
7. Celebrate victories frequently.
8. Evaluate progress at intervals during the schedule. Are goals being met in the allotted time? What have been the outcomes?

and successful, it forms a foundation for the support that the advocacy campaign is seeking. Successful, strategic marketing efforts create advocates-in-waiting. They just need to be asked to step up to be identified as advocates. But don't leave either plan until you're in a crisis situation. It takes time to build both aspects effectively.

Networks, Intelligence, Creativity

There are three initial components when planning an advocacy campaign: networks, intelligence, and creativity. SLA members are proud of their ability to form, tap into, and make effective use of networks. An advocacy campaign requires the same networking expertise. Intelligence doesn't mean just the IQ variety, although plain old common sense and brain power are essential. Advocacy requires the intelligence gained from research and from harvesting information from networks. Don't try to launch a campaign until you are sure you know the issues inside out and have identified the best possible target audiences for your messages. Creativity is required in large doses. Use your creative thinking skills to make the campaign the best it can be. Get outside your comfort zone.

Several years ago, I was in the first group of elected leaders in the American Library Association (ALA) to be given two days of advocacy training. This effort has grown into a permanent advocacy training project within ALA. Part of that effort is a section of the ALA Web site that provides tools, tips, and other training and refresher materials. The action steps on that site have been adapted for use in this article. Visit www.ala.org/issues&advocacy and make use of the materials you will find there.

First Action Step—Key Issues. List up to five key issues that need the support of an individual, a specific group, or a broad range of people in your organization. These are not services you want to market to them, but they are things that need more than your "voice" to change, improve, move forward. They might include funding and budget needs, space concerns, staffing priorities, and improving the understanding by management of the value information professionals and their services bring to the organization. Perhaps your existence is in question and you are looking for champions to step up and verbalize the value they have gained from your presence and services.

Second Action Step—Prioritize. Prioritize your list of key issues and identify your goals. What is the most essential thing to accomplish immediately? Is there a deadline of some kind looming? Don't try to resolve all issues at once, but avoid changing your plea for support frequently because it will be confusing to your potential champions. Make sure one priority is accomplished before launching a follow-up campaign.

Third Action Step—Identify Audiences. Identify the key audience for each of the issues you have chosen to address. Who do you need to reach? Recognize that each priority may require reaching a different audience or a mix of audiences. Focus on gaining the support of opinion leaders—the "go-to" guys and gals whose word and leadership-by-example will carry weight in converting others into being advocates for information professionals and their services. A "case for support," similar to those developed for major fundraising campaigns in the nonprofit sector, will be a useful tool in setting forth the facts, arguments, anecdotes, and information to win over new advocates. (See sidebar.)

Fourth Action Step—Prepare Messages. Determine key messages. What is the most important thing you want others to know? Remember, it may be necessary to develop different key messages for different groups. Once you have created the message, be prepared to repeat, repeat, repeat. Use it consistently in multiple forms of communication. People need to see or hear a message at least four times before it starts to sink in.

Key messages need to be pithy, memorable, and short. You should be able to deliver your message in 15 words or less—an "elevator message" that can be delivered effectively between floors on an elevator ride, when you have a captive

Building a Case for Support

1. **History.** Be very brief. Include date and reason for inception (e.g., to support Strategic Planning Department), composition of staff (we grew to a staff of 12 and now operate with a staff of three information professionals, two administrative assistants, one information technology specialist, and one patent searcher), collection (not numbers, but examples of most used tools), and any other points that demonstrate the value of the department as it has evolved.
2. **Mission.** Why are you important to the organization or community? If you don't have a current mission statement this is the perfect motivation to create one or update an existing one.
3. **Accomplishments.** List specific situations where the library made decisions that resulted in improved information resources and services (you might list major findings from a recent marketing survey); areas where the library partners with other departments in the organization; instances when work by information professionals has resulted in saving the company time or money; examples of how information professionals have

audience. If you can't express your key messages succinctly, you don't understand the problem. Go back to the drawing board and try again. Test your messages with staff and supportive colleagues, to be sure that what you are communicating delivers the message you intend to deliver. If any of these "test" groups don't get it or don't interpret your message the way you intended, re-do it until you get it right.

Think about each intended audience. What do you want them to think, feel, and do? Your key messages should spark a response. Just be sure you are sparking the desired response.

Develop talking points in the form of short stories. Find up to three that support each of your key messages. Use descriptive, local, familiar examples. Alter the talking points based on the needs, concerns, and information (or misinformation) of different audiences.

Good stories should put a human face on the library and its dynamic staff. They should be simple, brief, and personal. Use anecdotes of success by people who have used the library effectively. Show the information professional clearly solving a problem or filling a need. Illustrate the benefits of library use in real-life terms. Remember to promote the value of the professionals and their expertise—not just the value of the library, especially as a physical space.

Is there a story specific to your organization that will prompt individuals to act in support of the library and its staff? It might give details about how the library provided assistance that resulted in the company winning a major new contract. If research by information professionals led to a decision that saved the organization significant amounts of money, tell the story briefly and often.

Fifth Action Step—Build a Team. Build a network of people to carry the message to potential new supporters. Communicate frequently with people in your advocacy network. Train them to be effective spokespersons. Keep them on target and motivated to deliver the message at every opportunity.

Logical choices for the team are staff, friends of the library and library committee members. Have diversity on the team. Don't send the same person to deliver the "pitch" every time. If your target for one key message is a group of top executives, recruit a supportive member of the group to deliver the case for being advocates for the library. Send a department head to "convert" other department heads. Invite a library-friendly administrative assistant to address her peers. Identify a "techie" to talk to the IT contingent. The simple message from all of them should stress that using the library has saved them time and money, advanced their careers, made them look good to other people either within or outside the organization, or some other benefit that people can identify with.

Tips for an Effective Spokesperson

Be prepared with positive answers to negative questions. One of the most frustrating comments for people who are trying to build a core of advocates for the library is, "I have the Internet on my desk, everything is on it, and it's all free, so why do I need the library?" A defensive response: "You're wrong. Everything isn't on the Internet." A valid answer: "Yes, there is a lot of material on the Internet, but it often does not go back as far as we need to go historically, it is not always accurate, and many of the things we need are not free, even on the Internet." A stronger response recommended by a staunch supporter of libraries is, "The Internet is an information wilderness untamed by the fact-checking that we require in order to make sound decisions."

Trained spokespersons master the use of three tools—bridge, flag, and hook. When you bridge, you answer a good question then create an opportunity to make your point. For example, after answering the question, you might say, "There's another question I'm often asked…." A flag focuses the listener's attention on your words, similar to the red flag at the side of timely email messages. "The most important point I have to make concerns…." When you hook, you trap listeners into hearing multiple points. "There really are three ways to answer that question…." When you start an answer that way, your audience is forced to either be extremely rude or stick it out and listen until the end of your delivery.

Be Passionate About Advocacy

If you have planned and marketed your services based on user needs and you are doing well what needs to be done, you will have the foundation for building a network of advocates. They already trust and believe in you. They just need to be asked to join your vocal supporters. Your passion for what you do and for gaining greater support for your competencies and services will go a long way toward recruiting advocates and solving, or at least improving, some of your key issues.

Your network of advocate recruiters will succeed based on your level of commitment to the cause that will infect them with enthusiasm. Don't wait for a crisis to arise before trying to recruit more and strong advocates.

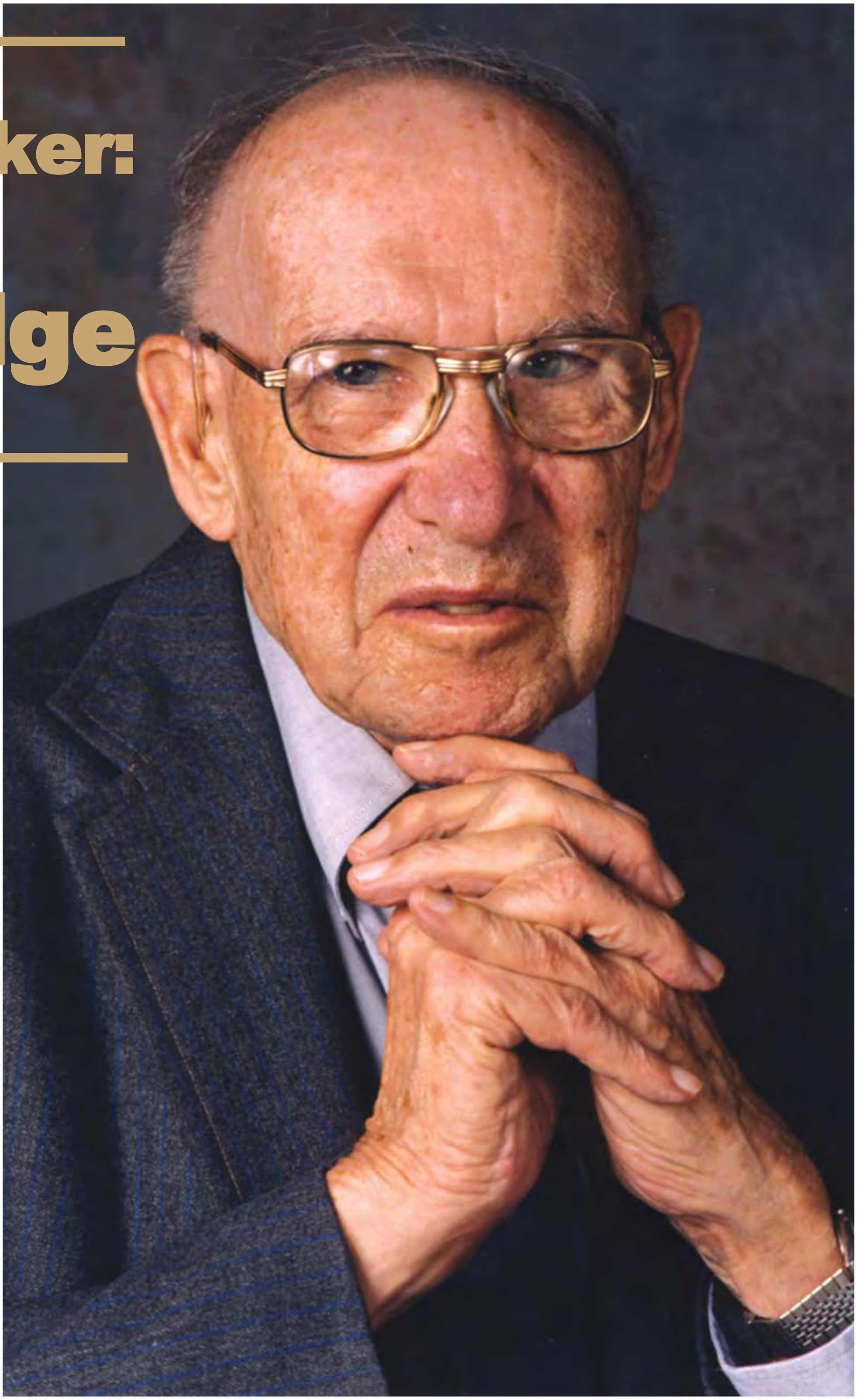
aided the organization in attracting new clients, grants, honors, awards, etc. This list should be different for each target audience because it should answer the question "What have you done for me" or "What benefit could I expect to gain from working with you."

4. **The problem.** This is a clear statement of the issue you are targeting for solution and support. Explain why it should be of concern to each audience. For example, if the current campaign to build a core of advocates results from budget cuts, explain which information resources may have to be eliminated. Select those to list based on the needs and former usage by each person or department being targeted by the case for support.

5. **Actions**. Discuss what actions advocates should take. Be specific. Should they e-mail the finance committee, send a letter to the CEO, drop by and talk to your manager, write an editorial for the employee newsletter, make a comment on their personal blog, etc.

6. **Benefits.** List the expected benefits to the target audience if the campaign for support is successful. Summarize how success will be measured.

Peter Drucker: A Life of Knowledge



Peter F. Drucker is seen in this recent but undated photo made available by Claremont Graduate University Nov. 11, 2005. Drucker, revered as the father of modern management in his numerous books and articles stressing innovation, entrepreneurship and strategies for dealing with a changing world, died Friday, a spokesman for Claremont Graduate University said. He was 95. (AP Photo/Claremont Graduate University)

By Bruce Rosenstein

Peter Drucker, who died on November 11, eight days before his 96th birthday, was not only the world's top authority on management, but a lifelong admirer of librarians. He was the keynote speaker at the 2002 SLA Annual Conference in Los Angeles.

In a February 2002 interview with *Information Outlook*, he said: "I love librarians and have been doing so since I was a young trainee, not yet 18, on my first job…Librarians in a special library know what their customers need and often they know it much better than their customers in the organization do. They can—and do—anticipate the customer's information needs. They can—and do—reach out to the customer and point him or her in the right information direction. They can—and do—know what new data is in their customer's field or sphere of interest."

Drucker was the first to identify a class of knowledge workers more than 40 years ago. No one did knowledge work better, as he pursued a nearly 70-year career as a writer, professor, and consultant.

He was working—albeit at a considerably slower pace—until the final weeks of his life. His 39th book, *The Effective Executive in Action: A Journal for Getting the Right Things Done*, will be published next month. It aims to update parts of one of his best-selling books, 1966's *The Effective Executive*.

His capacity for work and writing was legendary. Along with his books, he wrote a steady stream of articles over many years for such publications as *Harper's, The Atlantic Monthly, Forbes, The Wall Street Journal, The Economist,* and *The Harvard Business Review*.

Drucker systematized the study of management in the 1940s and 1950s, earning the unofficial title "the father of modern management." He had legions of high-powered admirers, including retired General Electric CEO Jack Welch, retired Intel chairman Andy Grove, and Jim Collins, author of *Good to Great*, who wrote the Foreword to 2004's *The Daily Drucker*.

Drucker received the Presidential Medal of Freedom, the nation's highest civilian honor, from President George W. Bush in 2002. His worldwide influence was further demonstrated later that year in Ken Witty's documentary, "Peter Drucker: An Intellectual Journey," first shown on CNBC and now on video.

Education was extremely important to him. He began his career as a college professor in the 1940s and from 1971-2003, he taught at the Peter F. Drucker and Masatoshi Ito Graduate School of Management, at Claremont Graduate University, in California. The school advertises its philosophy that management is a liberal art, something that will be familiar to Drucker's readers from his numerous references to art, literature, history, philosophy, religion, etc.

He became a pioneer in e-learning by creating an exclusive series of online teaching modules for Corpedia (www.corpedia.com), the Peter F. Drucker Executive Management Series. Drucker was born in Vienna on November 19, 1909 (coincidentally or not, the year that SLA was formed). After receiving a law degree in Germany, he worked in finance and journalism before deciding he was more interested in and suited for the latter.

He came to the United States in 1937, where he stayed in journalism and began writing books. His first, The *End of Economic Man* (1939), was favorably reviewed by Winston Churchill. Drucker never lost his international touch. He had a world-wide following—particularly in Japan—and his books were translated into many languages.

Drucker eventually became a management consultant, and a professor at Sarah Lawrence College, Bennington, New York University, and eventually Claremont, which named its management school after him in 1987.

He was particularly fond of non-profit organizations. In 1990, three of his longtime associates, Frances Hesselbein, Bob Buford, and Dick Schubert, formed The Peter F. Drucker Foundation for Non-profit Management (now called the Leader to Leader Institute).

In recent years, he helped publicize the mega-church phenomenon, and was a long time mentor to Rick Warren, pastor of Saddleback Church in Lake Forest, California, and author of the hugely successful book, *The Purpose Driven Life: What on Earth Am I Here For?*

Ideas that are central to the work of librarians and information professionals, such as the data-information-knowledge continuum, were concepts that he had to teach to executives.

In his 1995 book Managing in a Time of Great Change, he writes "... information has to be organized so as to question and challenge a company's strategy. To supply data is not enough. The data have to be integrated with strategy, they have to test a company's assumptions, and they must challenge a company's current outlook."

Our profession is familiar with the power of questions, something Drucker codified in the "Drucker Foundation Self-Assessment Tool" (http://www.drucker.org/leaderbooks/sat/questions.html), a five question exercise for organizational development that is also useful for individuals: What is our mission? Who is our customer? What does the customer value? What are our results? What is our plan?

Information professionals can admire and learn from Drucker's voracious reading habits. In 2004, he told *USA Today* that his recent readings included Balzac, "the Bible— mostly either the Psalms or the Epistles of St. Paul," Solzhenitsyn and Dickens. "And I always read a lot of magazines," he added.

Drucker also stressed self-development, or what he called "Managing Oneself," one of the largest chapters in his 1999 book, *Management Challenges for the 21st Century*.

We have now entered the post-Drucker world. But the intellectual legacy he left will keep information professionals nourished for years.

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7 Steps for Sourcing Information Products

By Helen Clegg and Susan Montgomery

Sourcing information products is a complex exercise involving many variables. In today's uncertain business climate, information budgets are sensitive to scrutiny and constantly under threat. In many cases, information professionals are faced with trying to get more value from suppliers with a flat or reduced budget or contending with a "now we have it, now we don't" scenario. What's more, there is a lot of rival content available from the Internet, making it more difficult to justify expenditure on pricey products.

As a category, information products pose a number of challenges to the information professional tasked with sourcing them. Information products constitute a complex category because they are difficult to compare on a feature-by-feature basis. Although there may be considerable overlap among the content offered and the products purchased, each one has certain unique features and a core group of users who consider these different products indispensable to their work. User needs can differ too, adding to the difficulty of comparing one product with another. In some segments of the market (real-time stock market data, for example) there is a virtual monopoly, which limits the relative power of the buyer. In the case of online news services, the tool itself, as well as the content, must be evaluated. Furthermore, the rate of product enhancement and innovation in this category continues to increase as vendors seek to sustain their current customer base and capture more market share.

The pricing structure of information products is another challenge. There is little transparency when it comes to pricing policies and they are constantly changing. Every information provider has its own pricing structure and all are reluctant (indeed, may refuse) to discuss their cost structure. For example, what margin is an information provider making on a piece of information that they resell to you? How do you know how good a deal you are being offered? Without having an insight into questions like this, it is difficult to negotiate effectively.

Often contracts expire at different times of year, so information professionals find themselves negotiating with each provider separately and sometimes risk losing access to the service if they do not agree to a new contract before an existing contract expires. In large organizations, there may also be multiple relationships with the same supplier, leading to potential duplication of data purchases and missed opportunities to leverage the total spend. And to top things off, contract durations are often for only a year; no sooner do you conclude a negotiation than it seems like it's time to start the next round.

With so many things to take into consideration, it's a tough job for information professionals to secure the best deal for their organizations in terms of value and money. One information professional commented, "I've been dumped in at the deep end with no negotiations training, and it's sink or swim." It's not an equal contest when an amateur negotiator has to go face-to-face (or fact-to-fact) with a professional salesperson.

By thinking strategically about sourcing information products and using a proven process such as A. T. Kearney's Seven Steps for Strategic Sourcing, information professionals can successfully source or renegotiate contracts for information products and alleviate the contract negotiations quagmire. This method can be applied to sourcing all kinds of information products and services and has been successfully used to source information products for companies in sectors such as financial services and pharmaceuticals, where information has a strategic value. Following the process leads to optimal negotiations because the facts have been gathered and analyzed and the organization has a firm base from which to conduct negotiations with suppliers.

Seven Steps of Strategic Sourcing

The seven-step process has been tested and proven effective for sourcing information products ranging from online databases and real-time market data to subscription

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Figure 1. The 7-Step strategic sourcing process

Source: © 2001 A.T. Kearney

services, primary and secondary market research and other information services. The final result may be savings in hard cash (typical savings range between 4 percent and 20 percent), greater added value from the suppliers, and/or time and aggravation saved on a previously time-consuming and unwieldy exercise. (See Figure 1.)

Step 1: Profile the category

The purpose of Step 1 is to understand your organization's internal spend for information products and the external market. A clear understanding of both aspects is critical to determining the best sourcing strategy (Step 2) and to having a strong fact base when it comes to negotiations (Step 5). Step 1 is one of the most time-consuming steps of the whole process so it is important to start well in advance of your target for completing a contract.

Ordinarily, a category consists of a number of products from similar vendors that can be grouped together in a competitive sourcing exercise. For example, an automotive company might purchase different tires for different vehicles from different manufacturers. It may make sense to group the total spend on tires together into one category in order to identify savings potentials. While information products are often purchased on a one-by-one basis, consider whether, moving forward, it would be advantageous to group several products into one sourcing exercise. Carrying out a vendor segmenta-

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Susan Montgomery is a content manager with A. T. Kearney Procurement Solutions. She develops toolkits and collaborative systems for managing category sourcing knowledge. She has extensive experience in international business research. She worked in London for 15 years, where she was an active member of Aslib and started the Information Resources Management Network in 1992. She can be reached at Susan.Montgomery@atkearney.com.

tion analysis is one way to position the product in relation to others purchased by your organization. (See Figure 2.)

Spending analysis. The task of identifying your organization's total spending with a vendor (or vendors) needs to begin well in advance of contract negotiations. Your accounts payable department should be able to supply this information; however, you may also need to request the vendor supply information on all existing contracts within your organization so that you have a complete picture of the spend in terms of dollar amounts, locations, number of users and volume of usage, pricing, terms and conditions and which sources are used most heavily. By doing this exercise, one company found that it had multiple contracts with a supplier of credit information, several contracts with an online news vendor, and two separate contracts with a news aggregator. (See Figure 3.)

Make sure you draft your request for data carefully so that you get back from the supplier the spend information that you require in the format you want it. Your aim at the end of the day is to have a clear picture of what your organization is currently spending with the supplier.

Needs analysis. You also want to interview key current users to develop a thorough understanding of their needs for the product, their view of the supplier's performance, and any enhancements that they would like to see in the product (budget permitting, of course!). What content do you absolutely need to satisfy the present and future requirements of your users?

If you have identified other departments within your organization that have contracts with information providers, work with them to produce a thorough analysis of your needs. This could take longer than if you were doing it just for your own department, but it will likely pay off with more favorable contract terms and conditions.

Supply market analysis. The second facet of Step 1 is to understand the external supply market in which the supplier operates and the market pressures the supplier faces. What is the current competitive situation? Are providers under cost pressures, competitive pressures, technology pressures? What other suppliers could supply the same content and functionality (or nearly so)? What are the trends in the information industry? What insights can you get into the value chain, suppliers' cost structures, and pricing?

Although difficult to do, understanding your vendors' pricing structures should come early in the seven-step process. Any information you can glean on the vendor's pricing policy can turn into a powerful negotiations tool.[1] Listen carefully to all the information your vendor is prepared to give you. In one situation, a vendor revealed the amount it was paying in royalties. The company's negotiating team was able to use this information to make an informed estimate of the margin the vendor was making and leveraged this information to negotiate a more favorable price.

Often it is helpful to formally encapsulate your knowledge of the supply market with a short market overview as well as a Porter's five forces analysis,[2] which describes the forces driving industry competition. (See Figure 4.) Not only does this help to crystallize your own thinking, but it will inform others on your team who may not be so familiar with the information marketplace. If you are dealing with a single supplier,[3] you want to learn as much as you can about the state of the supplier's business and draft a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis of the supplier.

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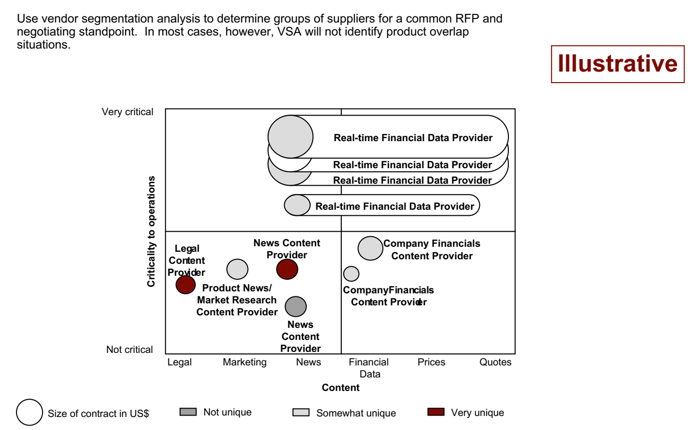
Figure 2. Vendor segmentation analysis



Source: A.T. Kearney analysis

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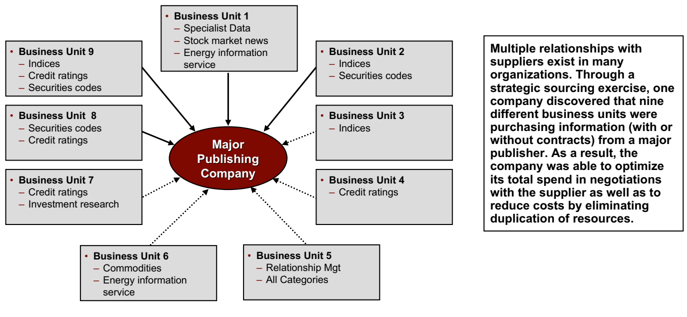
Figure 3. Multiple relationships with one supplier



Source: A.T. Kearney

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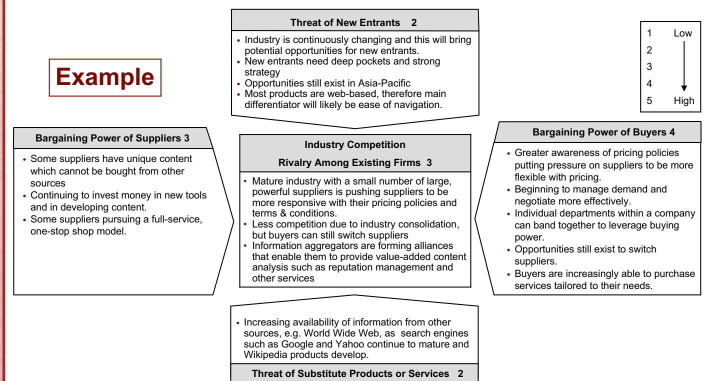
Figure 4. Porter's five forces analysis for the information products industry



Source: A.T. Kearney analysis

Step 2: Select the sourcing strategy

Armed with the insights you have gained in Step 1, you are now ready to consider your "go to market" approach. You need to consider how the product you are sourcing aligns with your company's overall strategy. Where would you place the product you are sourcing within a category positioning matrix? Once you have decided this, you are in a position to decide on which strategies you wish to pursue, as Figures 5 and 6 show.

For information products or services that fall within the "Non-critical" or "Leverage" categories, the most appropriate sourcing strategies are "Volume Concentration" (combining your organization's total spend to gain leverage with the supplier) and "Best Price Evaluation" (negotiating on price). Global Sourcing refers to opportunities to develop new vendors and extend the geographic vendor base, for example through low cost country sourcing or outsourcing opportunities.

For information products or services that fall within the "Bottleneck" or "Strategic" categories, the most appropriate sourcing strategies are "Product Specification Improvement" (can the supplier tailor the product more specifically to your organization's needs?), "Joint Process Improvement" (can you and your supplier work together to provide better value and more usage?) and "Relationship Restructuring" (establish long-term partnerships with key suppliers in return for preferred pricing).

Another strategy to consider in your equation is demand management. Does your organization really need all the passwords or seats that you currently have? Do some users require access to only a certain part of the product, rather than the whole thing?

Now that you have done your groundwork and are clear about your strategy, you are ready to engage the suppliers.

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Figure 5. Category positioning matrix

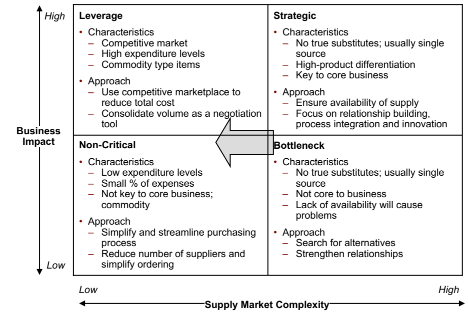

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Figure 6. Sourcing strategies

Step 3: Generate the supplier portfolio

Step 3 is about widening your supplier base and identifying all viable suppliers. With information products, the potential number of suppliers is likely to be limited. This is especially true when it comes to business information products, as there has been much consolidation among suppliers. Just a decade ago, there were independent commercial online databases such as Pergamon Online, IP Sharp, DataStar, Dialog, Dow Jones, and MAID. Today, the information provider industry looks very different, with the Thomson Corporation owning both DataStar and Dialog and Dow Jones having linked up with Reuters to develop the Factiva product.

Despite the industry trend toward consolidation, new suppliers are always emerging. In the 1990s, for example, Datadownlink, also then known as ".XLS," made an appearance. Today, the company is known as Alacra and has gained a strong foothold as a supplier of business information. Bloomberg and Hoovers Online are other examples. Similarly, information providers you might have dismissed at one time because their products were not up to the standard you once needed, are fighting back and winning market share by understanding and implementing the needs of their customers quicker than their competitors.

Use the needs analysis you did in Step 1 to develop your criteria for supplier selection. The criteria will depend on a range of factors including the type of information you need to provide to your users, whether you are buying information products for end users or whether you are looking to negotiate an enterprise-wide agreement with a supplier. Table 1 lists some examples of criteria you might consider for selecting suppliers.

Do not discard any suppliers at this stage. Even if they are smaller or newer suppliers with whom you may not be familiar, they may offer more favorable contract terms than some of the larger information providers, particularly if you are a small information department and have a limited budget.

Step 4: Select the implementation path

The purpose of Step 4 is to decide the most appropriate execution strategy for choosing your short-listed suppliers.

Request for proposal. The traditional route taken by many procurement departments is to conduct a Request for Proposal. In the RFP the buyer states his requirements and asks suppliers to set forth the specifics of their proposed offer including pricing. Requiring the vendors to complete a standard pricing matrix will allow you to compare their offers on

Table 1: Examples of criteria for supplier selection

Criteria	Questions to ask the supplier
Geographic coverage	What geographies do you cover? What is your coverage of Central and Eastern Europe?
Industry and market coverage	What is your depth of coverage of industries and markets? (Ask for more detail about specific industries/specialist publications)
Full text vs. abstracts	How much of your content is full text?
Product content	Would we have access to all the material available to you or would content availability depend on the product/level of service chosen?
Indexing	How are documents indexed?
Search functionality	How advanced is the search functionality? Does the product have different levels of search functionality for end users and professional researchers? Does your product support Boolean logic?
Language	Does your product database cover foreign language publications?
Downloading	What formats are available for download? Are there any restrictions with regard to downloading and storing documents on PCs?
Housekeeping	Describe the housekeeping functions that are available for users to keep track of costs.
Help and Customer Support	What online help is available? Do you offer live customer support? What training do you offer?
Pricing	How does your pricing structure work? Is it per seat or per service/product? What charge do you make for redistributing articles?
Billing	How frequently do you bill customers? What format does normal billing take (per user ID, per charge back cost code, per location, per seat?)
Contract	What is the minimum length of contract? Do you do multi-year contracts?
Usage reports	What types of usage reports do you provide? Do you provide customized usage reports?

Table 2: When to use internet negotiations

Internet negotiations (should involve at least three suppliers)	Formal RFP and negotiations process
Subscription consolidators	Online content providers
Book distributors	Secondary market research providers
Primary market research services	Real time financial data providers
Credit information services	Unique content providers

an equal basis. One way to do this is to ask for pricing on a seat or user basis. A set of criteria and weightings for evaluating the completed RFPs must then be developed. The use of an electronic RFP tool can be a real asset in making sure that all potential suppliers respond in a consistent manner, speeding up the entire process and simplifying the analysis of responses.

Internet negotiations. Suppliers that have successfully got through the RFP process will then be invited to number of negotiations rounds. Negotiations may be conducted either face-to-face or, depending on the situation, by Internet negotiations (sometimes called reverse auctions or e-auctions). The advantage of using an Internet negotiation is that it compresses the time to arrive at the suppliers' "best offer" from days or weeks to a matter of hours. Even with the use of an Internet negotiation, however, there will still be a final contract negotiations process with the successful bidder.

Internet negotiations work best when there are at least three or more suppliers whose products are broadly similar; for example, subscription consolidators or book distributors. Internet negotiations are not appropriate in situations where the vendor you are dealing with provides unique content or the best content for a specific industry. In addition, it must be possible to categorize the information products so that you can directly correlate the suppliers' bids. You need to be able to compare apples to apples; for example, base the negotiation on price per seat. If you are part of a large organization and have a relatively high spend on information products with a number of suppliers, Internet negotiations would be a technique worth considering.

In a situation where there is only one viable supplier to consider, you may feel that the best approach is to negotiate directly with them, without issuing an RFP. Effective negotiations become Step 5 of the strategic sourcing methodology.

Before moving on to the negotiations stage, you must also have done your homework very thoroughly with regard to what you are spending with each supplier. Ensure that you know exactly what is being spent on each information product and what you are prepared to spend with each supplier over the next year, if you are negotiating a 12-month contract—this becomes your baseline.

Step 5: Negotiate and select suppliers

Many people dislike negotiating, but this fifth step of the strategic sourcing process is important and needs careful preparation.

Start with putting together your negotiations team. Typical roles to include on a negotiations team are the spokesperson, a senior authority, a technical expert, a user, and an observer (note-taker). Certain team members may also play the "good guy" or the "bad guy." If you operate a one-person information department, ask for support from someone in the finance or legal departments. You may even want to consider hiring a professional negotiator, if you are negotiating an extremely large and important contract and have little negotiations experience.

Develop your negotiations strategy. Information is the key here and includes the information from your RFPs and your needs analysis, as well as knowledge of what is happening in the supplier marketplace and the suppliers' likely bargaining stance.

Understand your current bargaining position. What is your most desired outcome (MDO), your least acceptable agreement (LAA) and your best alternative to a negotiated agreement (BATNA)? What are your negotiating levers?

What concessions are you prepared to give? Remember, however, that you should never concede anything without getting something from the supplier in return. For example, if you are dealing with a rather inflexible supplier who won't move on price, your sales representative may agree to giving you unlimited free training, letting you become a beta test partner or providing you with specific technical support.

Think about the supplier's objectives and take these into consideration as well. What do you think the supplier's negotiating position will be? What is driving their cost structure? The more you understand the supplier's position, the stronger your negotiating stance. At the end of the day, you and the supplier will need to arrive at a mutually acceptable agreement.

Develop the negotiations team's objectives and roles. Prepare a worksheet with key points for each negotiating session and hold a formal briefing session with your team. As a group, you must be very clear of your objectives before you enter the negotiations meeting and each member of the team needs to understand his or her role.

Have a contingency plan. What is your best alternative to a negotiated agreement (BATNA)? Are you willing to walk away from a deal if it doesn't meet your LAA?

The negotiations process may require several meetings with each of your potential suppliers before you come to an agreement. It is valuable to have a team member whose role is to take notes of the discussions so that any agreements and sticking points are documented. The negotiations process does not end until you have everything in writing. Remember, too, that everything is negotiable and that you really do have more power than you may think!

Step 6: Integrate suppliers

If you have decided to work with a new supplier and/or to discontinue an old one, you will need to

- Identify any transition issues (providing user details to the new supplier, for example)
- Consider the organizational implications and any required changes
- Create new processes and procedures if necessary (for example, how will charge-backs be handled?)
- Create a transition/implementation plan
- Communicate the changes to your users

Step 7: Monitor the supply market and supplier performance

Once your new agreement is in place, it's time to start thinking about the next sourcing exercise. Plan ahead and stay abreast of your supply market conditions, so that next time your contract is up for renewal you've already done part of the groundwork.

In your new contract, state performance metrics that you have agreed upon with your supplier, for example joint process improvements, quarterly meetings and monthly usage reports. What procedures will you put in place to monitor these on a regular basis, and how will you develop your relationship with the supplier so that you have a foundation to work from next time?

Lessons Learned

Each time you work through the strategic sourcing process you will improve your skills at sourcing this category. Some key lessons to bear in mind when sourcing information products are:

- Plan your sourcing exercise at least two months in advance of contract renewal.
- Aim to have the contract signed a full two weeks before your current contract expires.
- Work at getting all your contracts to expire around the same time. This puts pressure on the vendors as there is more competition for your limited spend.
- Involve your company's purchasing department, if your organization has one. The purchasing department may have already used strategic sourcing techniques on other spend categories so it will be able to guide you through the process; professional buyers are experienced negotiators. They may also have access to electronic sourcing tools, such as electronic requests for proposals (RFPs) and internet negotiations that can expedite the sourcing process.
- Find a colleague who is an experienced negotiator and involve him or her in the process, if you feel you do not have enough negotiating experience.
- Manage the demand for the information products to which you subscribe. Do you really need all those seats you currently pay for?
- Learn as much as possible about the products' pricing structures.
- Get legal advice if you are at all unsure about any aspect of the contract.

Information products are a complex, highly fragmented category to source. It's not all about negotiating skills. It is about a following a proven, structured process and doing the necessary groundwork to understand your organization's real needs and your supplier's business. Following the seven steps of strategic sourcing will give you real advantage in the sourcing process and demonstrable results for your organization.

[1] Outsell, Inc. (www.outsellinc.com) is one source that specializes in market analytics for the information industry.
[2] Porter, Michael E., Competitive Strategy, Free Press, 1980.
[3] If you are negotiating a contract with a single supplier and there will be no competitive negotiations, your sourcing strategy and approach will be somewhat different. You should conduct a market scan to identify alternative suppliers if possible. You may want to negotiate a different end date for the contract to bring this supplier into competition with several others. You may also find that demand management is a critical key to savings in situations where there is only one viable supplier.

coming events

December 2005

Communicating the Value of Your Service
December 14
www.sla.org/virtualseminar

8th International Conference on Asian Digital Libraries
12-15 December 2005
Bangkok, Thailand
http://www.icadl2005.ait.ac.th/

IASLIC 2005
All India Conference of the Indian Association of Special Libraries & Information Centres
26-29 December 2005
Chennai, India
http://www.cenlib.iitm.ac.in/iaslic2005/

January 2006

SLA Leadership Summit
January 18-21
www.sla.org

ALA Midwinter Meeting
American Library Association
January 20-25
San Antonio, TX, USA
www.ala.org/ala/eventsandconferencesb/midwinter/2006/

Open Repositories 2006
Australian Partnership for Sustainable Repositories (APSR)
31 January-3 February 2006
Sydney, Australia
http://www.apsr.edu.au/Open_Repositories_2006

February 2006

8th International Bielefeld Conference
Bielefeld University Library
7-9 February 2006
Bielefeld, Germany
http://conference.ub.uni-bielefeld.de/2006

ECURE 2006: Preservation and Access for Digital College and University Resources
Arizona State University
27 February-1 March 2006
Tempe, AZ, USA
http://www.asu.edu/ecure/

March 2006

Spring 2006 ASIDIC Meeting
Association of Information and Dissemination Centers
12-14 March 2006
Fort Myers, FL, USA
http://www.asidic.org/meetings/spring06.htm

Computers in Libraries 2006
Information Today
22-24 March 2006
Washington, DC, USA
http://www.infotoday.com/cil2006/default.shtml

ASPP 4th Education Conference
American Society of Picture Professionals
March 23-26
San Francisco, CA, USA
www.aspp.com

2006 Information Architecture (IA) Summit
ASIS&T
March 23-27, 2006
Vancouver, BC, Canada
http://www.iasummit.org/

CONSAL XIII
Congress of Southeast Asian Librarians
25-30 March 2006
Manila, Phillippines
http://www.consal13.up.edu.ph/new/

April 2006

Buying & Selling eContent
Information Today
9-11 April 2006
Scottsdale, AZ, USA
http://www.buy-sell-econtent.com/

20th Annual AIIP Conference
Association of Independent Information Professionals
19-23 April 2006
Coral Gables, FL, USA
http://www.aiip.org/Conference/2006/index.html

SCIP06
Society of Competitive Intelligence Professionals
April 26-29
Orlando, FL, USA

May 2006

Annual AIIM ON DEMAND Conference & Expo
AIIM: The ECM Association
15-18 May 2006
Philadelphia, PA, USA
http://www.aiim.org/article-events.asp?ID=3277

37th Annual Conference of the CPLQ
Corporation of Professional Librarians of Québec
17-19 May 2006
Laval, Québec, Canada
http://www.cbpq.qc.ca/congres/congres2006/Call_for_papers_2006.html

MLA '06
Medical Library Association
19-24 May 2006
Phoenix, AZ, USA
http://www.mlanet.org/am/

ICEIS 2006
8th International Conference on Enterprise Information Systems
May 23-27
Paphos, Greece
www.iceis.org

LIDA 2006
Libraries in the Digital Age
29 May-4 June 2006
Dubrovnik and Mljet, Croatia
http://www.ffos.hr/lida/

June 2006

CAIS/ACSI 2006 Annual Conference
Canadian Association for Information Science
1-3 June 2006
Toronto, ON, Canada
http://www.cais-acsi.ca/2006call.htm

JCDL 2006
Joint Conference on Digital Libraries
11-15 June 2006
Chapel Hill, NC, USA
http://www.jcdl2006.org/

2006 CLA Conference
Canadian Library Association
14-17 June 2006
Ottawa, ON, Canada
http://www.cla.ca/conference/cla2006/event_proposals.htm

LISA V
Library and Information Services in Astronomy V
June 18-21
Cambridge, MA, USA
www.cfa.harvard.edu/library/lisa

AH 2006
Adaptive Hypermedia and Adaptive Web-Based Systems
21-23 June 2006
Dublin, Ireland
http://www.ah2006.org/

ALA Annual Conference
American Library Association
22-28 June 2006
New Orleans, LA, USA
http://www.ala.org/annual

July 2006

Ninth International ISKO Conference
International Society for Knowledge Organization
4-7 July 2006
Vienna, Austria
http://isko.univie.ac.at/cms2/

index of advertisers

Did Google Boggle It Up?

By Lesley Ellen Harris

Discussion is rampant amongst the content and information industries about the legality of Google's Print Library Project. Notwithstanding two recent lawsuits against Google, on November 1, Google Inc. announced that it will resume scanning copyright-protected library books into its search engine. Google voluntarily suspended its scanning activities in August 2005 in order to allow publishers time to decide whether they want to opt their copyright-protected books out of the Print Library Project.

Print Library Project

Similar to the music industry, the print sector is now grappling with how best to protect its intellectual property in the digital age. However, time is no longer a luxury for the print sector with projects like the Google Print Library Project. In the project, Google will scan millions of library books then allow consumers to search for keyword phrases within these books and to access relevant portions or snippets of the text. Google claims that it will scan copyright-protected works that are out of print and will obtain publishers' permission to scan books that are still in bookstores. Under this project, Google will scan the works of the collections at the University of Michigan, Harvard and Stanford. The New York Public Library and Oxford University's Bodleian Library collections will also be part of this project but only with respect to works in the public domain.

When the project is complete, Google will have scanned and digitized millions of published books, from which it will create an online, searchable database for the public. The specifics of this project have not been made clear by Google. For instance, how will the digital copies be protected against further distribution without permission? How will Google protect against abuse of its own search tool that limits access to the books? How will Google guarantee that snippets of works accessible to consumers will not grow to "small amounts" to "larger amounts" or to entire works?

Print Publisher Program

Google has another program, the Google Print Publisher Program. Under this program, publishers give permission to Google to scan their books and to make their books available through the Google search engine. Publishers have the option to allow Google to display only bibliographic information or a small excerpt of the text to a consumer. This project is not the subject of any lawsuits because it is undertaken with the permission of the book's publisher or author.

The Law Suits

Two recent law suits are aimed at the Google Print Library Project.

On September 20, the Authors Guild filed a suit in federal court in New York alleging that Google is engaging in massive copyright infringement (unauthorized scanning and copying of books in the Google Print Library program) at the expense of the rights of individual writers. The Authors Guild, a Lincoln biographer, a children's book author, and a former Poet Laureate of the United States, filed a class action suit. The complaint seeks damages and an injunction to halt further infringements.

On October 19, the Association of American Publishers (AAP) filed a suit in federal court in New York against Google over its plans to digitally copy and distribute copyright-protected works without permission of the copyright owners. The suit seeks a declaration by the court that Google commits copyright infringement when it scans entire books covered by copyright without the permission of the copyright owner. The AAP filed the suit on behalf of five of its major members: The McGraw-Hill Companies, Pearson Education, Penguin Group (USA), Simon & Schuster and John Wiley & Sons.

Out of Print Does Not Mean Public Domain

In understanding the law suits, it is important to be aware that out-of-print books are often still protected by copyright. Out-of-print means books are no longer available for purchase, however at a later date, the same or another publisher may decide to put the book back into print, or the author of the work may (as is popular in the digital age) self-publish the book himself.

In addition, many publishing agreements revert the rights in an out-of-print book back to the author of the work. So, it would be the author and not the publisher who would then give permission to participate in the Google project.

Fair Use

Amongst other defenses, Google's strongest defense is fair use. Fair use comes into this discussion twofold. First, is Google's massive copying of books fair use? Second, would fair use include the snippets of books Google is allowing consumers to access under its project?

Fair Use and Massive Copying

Google claims that all of its activities under the Print Library Project are covered by fair use. A full analysis of fair use goes beyond the parameters of this article.

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Suffice it to say that fair use usually involves copying a limited portion of an entire work, or a small amount of works owned by a single or a few copyright owners. Fair use has never before been applied to such massive copying as in the Google projects.

In any fair use analysis, a court must take into account several factors, including whether the use of the copyright-protected work will affect the market for it. Certainly, the complainants in the court cases will argue that if the Google project proceeds, then the market for copyright owners to license their books and obtain payment for those licenses will be non-existent.

Fair Use and Searches/Limited Access

Google claims that it will only allow consumers to access small amounts of text, which would presumably fall under the fair use provision in the U.S. Copyright Act. The application of fair use to individual copying continues to be a contentious issue under U.S. law as is its comparative provision of fair dealing found in Commonwealth countries. The U.S. law does not state exactly what would be considered fair use, and it is ultimately up to a court of law to make this determination based upon all of the facts, the purpose of use, and a determination of fairness according to the four factors set out in the U.S. Copyright Act. In allowing individuals access to portions of its digitized books in the Google project, Google is arguably making this determination on behalf of its users. This could put Google in violation of fair use, and individual users may also be put in the position of violating fair use.

Interpreting Fair Use

Copyright law has always been a matter of balance, of providing protection to copyright owners while allowing reasonable access to consumers of copyright-protected materials. This means balancing the rights of authors and publishers against the rights of libraries. This balance is made by legislators and the courts, and the backbone for any interpretation of fair use is the U.S. Constitution (Section 8, Clause 8), which authorizes Congress "To promote the Progress of Science and useful Arts, by securing for limited times to Authors and Inventors the exclusive right to their respective writings and discoveries."

How the courts will interpret the defense of fair use in the Google cases is yet to be seen. If the complainants succeed, Google will have to obtain permission from each copyright owner in each book (in which copyright still exists) it plans to scan and digitize. If the complainants do not succeed, copyright owners will be faced with less control over their works and arguably lost income. Either way, the law suits pit authors and publishers against their otherwise friends, libraries.

Web 2.0 - Huh?! Library 2.0, Librarian 2.0

By Stephen Abram

Recently I was asked if some software applications I was involved in were Web 2.0 compliant. This was amusing and distressing on so many levels. It's amusing because what is being called Web 2.0 isn't a "standard" in almost any sense of the word. It's distressing because it shows how quickly a conversation becomes an expectation in today's world.

This is a perfect example of the power of the 95 theses of the Cluetrain Manifesto. You can remind yourself about these at www.cluetrain.com. The major thesis is No. 1: "Markets are conversations." Anyway, I thought it might be useful to devote this month's column to a little information on Web 2.0 and its newborn babies, Library 2.0 and Librarian 2.0. And why should you read this column? You've heard it all before but in a few years these Web. 2.0 conversations will have the power to drive huge transformations in our media landscape and therefore our life, work, and play environments. Sigh.

Web 2.0

According to some sources, the term Web 2.0 has been around since about October 2004. From Wikipedia, the free encyclopedia (gotta love the price), it is defined as:

"... a term often applied to a perceived ongoing transition of the World Wide Web from a collection of websites to a full-fledged computing platform serving Web applications to end users. Ultimately Web 2.0 services are expected to replace desktop computing applications for many purposes. (http://en.wikipedia.org/wiki/Web_2.0)"

I think Web 2.0 goes much further than this, actually beyond an application focus. It's really about the "hot" Web. I am talking here about "hot" in the McLuhanesque sense of the hot and cold or warm and cool aspects of technology.

What makes the Web warmer or hotter? Interactivity. Of course the Web is already interactive in a cooler sense. You can click and get results. You can send e-mail and get responses. You can go to Web sites and surf. The old World Wide Web was based on the "Web 1.0" paradigm of Web sites, e-mail, search engines, and surfing.

Web 2.0 is about the more human aspects of interactivity. It's about conversations, interpersonal networking, personalization, and individualism. In the special library world this has relevance not just to the public Web but also to intranets and the imperative for greater social cohesiveness in virtual teams and global content engagement. Plain intranets and plain Web sites are fast becoming old stuff, just so last century. The emerging modern user needs the experience of the Web, and not just content, to learn and succeed. Context is the word of the day here. Such technologies as are listed below serve as the emerging foundation for Web. 2.0:

- RSS (really simple syndication)
- Wikis
- New and revised programming methods like AJAX and API's
- Blogs and blogging
- Commentary and comments functionality
- Personalization and "My Profile" features
- Podcasting and MP3 files
- Streaming media audio and video formats
- Reviews and user driven ratings
- Personalized alerts
- Web services
- Instant messaging and virtual reference including co-browsing.
- Folksonomies, tagging and tag clouds
- Photos (e.g. Flickr, Picasa)
- Social networking software
- Open access, open source, open content
- Socially driven content
- Social bookmarking

The technology infrastructure of Web 2.0 is complex, constantly in flux and really in a Renaissance mode. It includes server software, content syndication, messaging protocols, standards-based browsers, and various client applications.

This is fundamentally about a transition of the Web site and e-mail centric world from one that is mostly about information (and largely text information) to one where the content is combined with functionality and targeted applications. Web 2.0 can be seen as the Web becoming a computing platform for serving up Web applications to end users, but I believe that this is a too geek-centric point of view. It's primarily about a much higher level of interactivity and deeper user experiences that are enabled by the recent advances in Web software combined with insights into the trans-

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formational aspects of the Internet.

Web 2.0 is ultimately about a social phenomenon—not just about networked social experiences but about the distribution and creation of Web content itself, “characterized by open communication, decentralization of authority, freedom to share and re-use, and the market as a conversation.” To enable this new world we will see a more organized Web with a plethora of new modalities of categorized content and more developed deep linking Web architecture and a greater variety of Web display modes, like visualization. Ultimately this will result in another shift in economic value of the Web, potentially equaling that of the dotcom boom and, probably driving an even higher level of social, political, institutional, and economic disruption.

What is truly exciting is that Web 2.0 is just the title of a conversation. There is no standard (at least not just a single one). We can all participate. To the detail oriented, this conversation may be too high in the stratosphere with enough concrete recommendations, and to the theoretically inclined it may remain too visionary for real implementation. Among all of us, it is worth following. Web 2.0 is probably the series title of the most important conversation of our age and one

From Wikipedia (http://en.wikipedia.org/wiki/Image:Web_2.0.jpg, December 5, 2005).

whose impacts will likely be truly transformational on a global scale.

Web 3.0

There is even discussion and dreaming about a “Web 3.0.” One could speculate that the Google/Sun Microsystems alliance to create a Web-based operating system for applications like word processing and spreadsheets is an early indicator of this trend. Perhaps it’s something like the Croquet Project, which is very exciting and worth reviewing (www.opencroquet.org). It is a potential scenario of what Web 3.0 might look like. Web 3.0 will probably be even more distributed in form than Web 2.0 and maybe some of the Web 2.0 applications will disappear or merge with a new integrated whole. Web services or the emerging semantic Web may replace such things as social networking sites and repositories.

Library 2.0

In the special library and information professional world, we generally deal with a savvier audience of users relative to the general consumer, and, indeed, an easier to name and identify target. This means that when our most critical users don’t know about or use tools, we can inform them and train them in the newest technologies that can affect their success. For those users who can quickly become comfortable using technologies such as wikis, RSS, instant messaging, news aggregators and blogs, we can help them to leverage these in making a difference in reaching their goals and their institutional or enterprise goals.

Library 2.0 is another “conversation.” This narrative is around the concept of how to use the Web 2.0 opportunities in a library environment. It’s an exciting concept and one that can create a conversation that creates the next generation of library Web sites, databases, OPACs, intranets, and portals in a way that allows the end user to thrive and survive (and libraries along with them!).

Clearly every one of the technologies listed in Web 2.0 above—RSS, Wikis, blogging, personalization, podcasting, streaming media, ratings, alerts, folksonomies, tagging, social networking software and the rest—could be useful in an enterprise environment and could be driven or introduced by the library.

Yes, I know that many of these are used individually in many of your environments. The beauty of Web 2.0 and Library 2.0 is the level of integration and interoperability that is designed into the interface through your portal or intranet. That’s where the real power to enhance the user experience is. To take advantage of the concepts inherent in Library 2.0 it is imperative to not shy away from adding advanced functionality and features directly into the content. This would provide the context and workflow-oriented features that users will demand or are demanding already.

Recently there has been a blog-based discussion about the need for renewed functionality in the ILS (integrated library system) and the OPAC. John Blyberg, has promulgated an ILS Customer Bill of Rights which asks for four things:

1. Open, read-only, direct access to the database.
2. A full-blown, W3C standards-based API to all read-write functions.
3. The option to run the ILS on hardware of our choosing, on servers that we administer.
4. High security standards.

While this list is largely focused on the systems librarian needs list, it does provide a foundation for Library 2.0 for end-users as long as we have Librarian 2.0 in place. Many of the requested aspects of Library 2.0 are already available in the ILS interfaces for those who choose to update to current versions. It just requires Librarian 2.0 to happen!

Librarian 2.0

Librarian 2.0 is the guru of the information age. Librarian 2.0 strives to:

- Understand the power of the Web 2.0 opportunities.
- Learn the major tools of Web 2.0 and Library 2.0.
- Combine e-resources and print formats and is container and format agnostic.
- Be device independent and use and deliver to everything from laptops to PDAs to iPods.
- Develop targeted federated search and adopt the OpenURL standard.
- Connect people and technology and information in context.
- Not shy away from non-traditional cataloguing and classification and choose tagging, folksonomies and user-driven content descriptions where appropriate.
- Embrace non-textual information and the power of pictures, moving images, sight, and sound.
- Understand the "long tail" and leverage the power of old and new content.
- See the potential in using content sources like the Open Content Alliance, Google Print, and OpenWorldCat.
- Connect users up to expert discussions, conversations, and communities of practice and participate there as well.
- Use and develop advanced social networks to enterprise advantage.
- Connect with everyone using their communication mode of choice—telephone, Skype, IM, SMS, e-mail, virtual reference, etc.
- Encourage user-driven metadata and user-developed content and commentary.
- Understand the wisdom of crowds and the real roles and impacts of the blogosphere, web syndicasphere, and wikisphere.

First and foremost, Librarian 2.0 understands users at a deep level—not just as pointers and clickers. Librarian 2.0 understands end users deeply in terms of their goals and aspirations, workflows, and social and content needs, and more. Librarian 2.0 is where the user is, when the user is there. This is an immersion environment that special librarians are eminently qualified to contribute to. SLA, with our Click University, should be well prepared to help our members to acquire and improve these skills and competencies.

It is essential that we start preparing to become Librarian 2.0 now. The Web 2.0 movement is laying the groundwork for exponential business growth and another major shift in the way our users live, work, and play. We have the ability, insight, and knowledge to influence the creation of this new dynamic—and guarantee the future of our profession. Librarian 2.0 – now.

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Don't Forget the 'Beanies'

By John R. Latham

A number of things recently have reminded me of my previous existence as a UK accountant. We have recently gone through the annual budget process, and although I have a small budget in monetary terms, I devour the process with the enthusiasm of a kid in a candy store. There are lots of analyses, comparisons and worksheets supporting the projections, and soundly based justifications for the collection development (monographs) budget line of $1,200.

A little over the top, but I enjoy it. At the same time I have been dealing with budgeting and program management in my financial management of information projects course at the University of Maryland. The British author of the book[1] that I have set for this course refers to the accountants as "beanies," a much-used British term for accountants, or bean counters. Second to lawyers, beanies do not get a very good rap in the popularity or excitement stakes, but as I pointed out to my students, whether you like it or not, you have to take them seriously.

You do not want to be specifically mentioned in the e-mail sent to all department heads by the finance director on a Friday night because your 2006 budget projections are overdue and holding up the figures for the board meeting. Guess how favorably your next request for increased funds is going to be received? Delivering financial reports on time is a good habit to get into.

Gone are the days of the accountant and senior management being the only people in the organization required to understand the business position and related financial statements. This is now a multi-disciplinary effort.[2] In the bad old days we complained that we were the unappreciated and unrewarded heroes or heroines of the company, but the book and serials budget was increased annually by at least the rate of inflation without a fight. Now it is a different ball game, and we are being asked to the "decision-making table," but it comes at a price. If we are going to play with the "big boys" we have to learn how to play with their toys: budgets, balance sheets, and income statements.

One of SLA's Competencies for Information Professionals of the 21st Century[3] states that the information professional "establishes effective management, operational and financial management processes and exercises sound business and financial judgments in making decisions that balance operational and strategic considerations." This means that you have to run your library, information center, department, program area, or whatever, as its own little business, and that you are the mini CEO, CIO and CFO all rolled into one. It may be stating the obvious, but you need to acquaint yourself with the financial tools used to facilitate financial management. Fortunately, in most cases, it can all be done easily using Excel spreadsheets, or such like. If you need a brush-up, Click University's new suite of Office Applications courses within its Course Libraries is just what you need at next to no cost—as little as $3 per course.[4]

For those of you who did not spend the first 27 years of your professional life as a CPA or FCA, which may well be quite a lot of you, I have to inform you that preparing and having your budget approved is not the end of that dreary story. Budgets have to be managed, reviewed and revised. Even if you are not required, by the beanies to prepare monthly reports on the comparisons of actual and budgeted results, I suggest that you set up your own simple system for monitoring major income and expenditure as it is incurred. This can be a useful check on the figures you receive from the accounts department, which may have misallocated income or expenditure. Keeping your own simple data will help to avoid unpleasant surprises when the financial figures are given to you. You don't have to be a financial genius to work out that it is best to be prepared for adverse results so that you can plan your response to management, and think of ways to reverse the trend or ameliorate the problem.

It amazes me sometimes how nearly everything in management comes down to communications and customer service. For some unknown reason we do not afford the beanies the same courtesies that we do others. If we were doing competitive intelligence work on an ongoing basis for staff or management, it would never occur to us not to notify them as soon as possible of significant events or changes. We would not wait for them to ask us whether any changes had taken place because we know that the information we provide them helps them to do the job more efficiently and effectively. So often one hears answers to questions about the financial results that it is the accountants' area. The accountants prepare the financial reports and statements, but they are just figures to them. They can point out trends and variances which need investigation, but we should know best what the figures represent and what is likely to have caused the adverse or favorable variances. By improving communications with the accountants, we will make their job a lot easier and allow them to make better, informed financial decisions. It is only good customer service.

Don't forget the beanies.

[1] Stutely, Richard. *The definitive guide to managing the numbers*. Pearson Education Limited, 2003.

[2] "Business Planning requires information & integration." Colm McDonnell. *Accountancy Ireland*. Dublin: February 2005. V37, #1: 66-67.

[3] Competencies of Information Professionals for the 21st Century, revised 2003. www.sla.org/competencies.

[4] Click University. http://sla.learn.com

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