12-2006

Information Outlook, December 2006

Special Libraries Association

vol. 10, no.12

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December 2006

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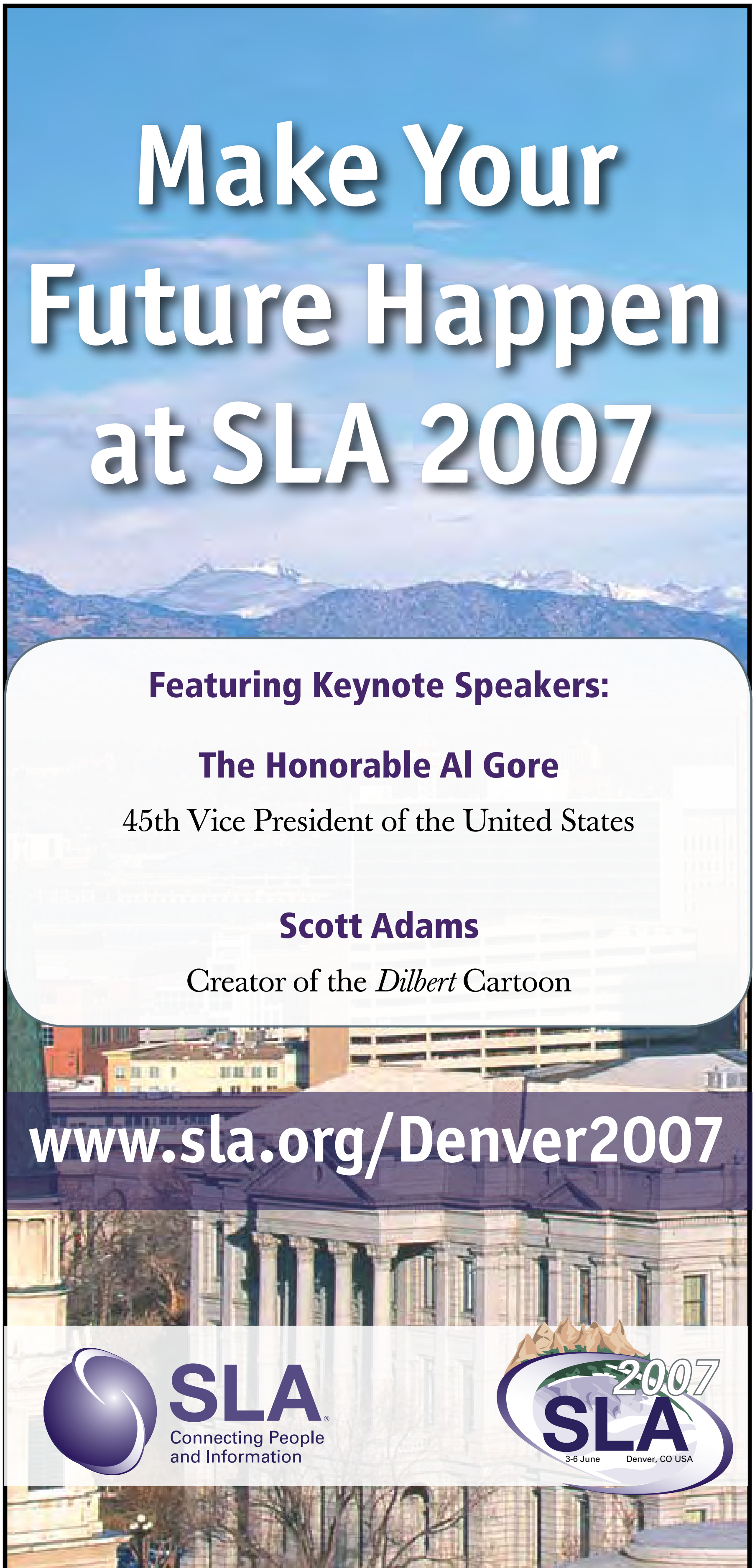

information outlook

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The Monthly Magazine of the
Special Libraries Association
Vol. 10, No. 12
December 2006

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Information Outlook®
(ISSN 1091-0808) is the monthly, award-winning publication of the Special Libraries Association, 331 South Patrick Street, Alexandria, Virginia 22314, magazine@sla.org. (703) 647-4900

2006 Subscription Rates:
Annual subscription, $125 (U.S. and International). Single issue, $15. Please report missing copies promptly to publications@sla.org. To ensure continuous delivery of *Information Outlook*, please notify SLA promptly of address changes by writing membership@sla.org. When submitting address changes, please include all the information on the mailing label. Changes may not go into effect for four to six weeks.

Postmaster:
Send address changes to Subscriptions, *Information Outlook*, Special Libraries Association, International Headquarters, 331 South Patrick Street, Alexandria, VA 22314-3501, USA. Periodicals postage paid at Alexandria, VA, and at additional mailing offices. Canadian Publications Mail Agreement #40031619. Return Undeliverable Canadian Addresses to: P.O. Box 1051, Fort Erie, ON L2A 6C7.

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The Power of Participation: 2006 in Review

I'm always one to take time at the end of a year to reflect on what we've accomplished and consider all for which we can be thankful. Actually, I encourage you and your colleagues to do this as well, as reflection is something sorely needed but rarely engaged in this day and age. For all of us in the SLA community, I believe that we will be able to look back on 2006 as a seminal period in the association's history. I'd like to take some time now to explain how a group of volunteer members helped to shape our collective future.

Seven task forces created by SLA Past President Pam Rollo devoted a significant amount of time in late 2005 and the first half of 2006 to assessing the future of the profession—and SLA's role in supporting it. The members who served on these task forces volunteered to take a fresh look at lingering challenges, rolled up their sleeves and talked to their colleagues through surveys and phone calls, and came up with a menu of options for us to consider over the next several years.

Each of these task forces submitted findings and recommendations for consideration by SLA as part of a strategic realignment of your association in order to revolutionize our shape, our scope, our purpose, and our plans for delivering new value to you—the SLA member.

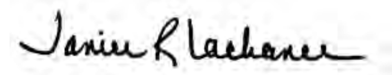
All of the findings and recommendations from these task forces were reviewed by the SLA Board of Directors and your staff here at SLA headquarters. We took them very seriously, and have already begun to act on many of them, but the most significant results are showing in our goals and objectives for 2007. You will be pleased to know that we utilized these recommendations to shape our planning and budgeting efforts for next year—a very clear sign that members can help to shape the association's future.

When the SLA Finance Committee met in September to approve our budgets for next year, they also took the next step in utilizing the findings of the task forces. Because a) those findings point to long-range implications for the association's future; and b) because the board of directors believes that we must act on these implications; the Finance Committee proposed that the board of directors invest up to 50 percent of the association's reserves into exploring the future of the profession. This exploration process will help us to prepare SLA to meet the needs of a diverse and changing community.

The board of directors carefully considered this proposal at their meetings in October. They considered what was recommended to them by the seven task forces and how important it is for SLA's future that we act on their hard work. They unanimously approved the Finance Committee's proposal, and will work with staff over the next few months to identify appropriate partners to help us conduct this exploration process.

I must commend our colleagues on the board for their professionalism and candor during their deliberations. 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 2007 and beyond, you can be sure of one thing: We will build on the successes of 2006 by refusing to stand still and 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

Below is a collection of sites that I heard about at the recent Internet Librarian conference in Monterey, California. The presentations were full of great tips and resources, and I wanted to share some with you.

John Battelle's Searchblog

http://battellemedia.com

If you want to go a bit beyond what the latest version of Internet Explorer or Firefox offers, take a look at this blog, which delves into "the intersection of search, media, technology, and more." Battelle is the author of The Search, a 2005 book that examines the history of the Web search industry, and in this blog he offers news and insight on the behind the scenes developments that impact the applications you use.

Usability.gov

www.usability.gov

Although I wrote about this site in the column last year, I thought it was worth another mention. The 2006 edition of Research-Based Web Design & Usability Guidelines has been posted, along with lists of new and revised guidelines. Among the new: use of personas, breadcrumb navigation, and increasing Web site credibility.

Feed2JS

http://feed2js.org/

An easy way to bring RSS feeds to your site without having to know XML. Simply plug the feed into the tool to create the JavaScript command, then copy/paste the XML to your site. Feed2JS can be installed on your own server and customized. Nifty.

Font Tester

http://www.fonttester.com/

Want to compare fonts before publishing them to your site? Paste your text into this tool and apply colors and various other properties. When you have the results you want, pull the code for placement on your site.

news briefs

NCLIS Opposes Tiered Net Services

The U.S. National Commission on Libraries and Information Science (NCLIS) has urged Congress to take all necessary action to ensure a status of "Internet neutrality."

"The current discussion centers on whether content transmission on the Internet should be subject to a system of prioritization known as 'tiered service'," said Commission Chair Beth Fitzsimmons. "So far, the underlying transmission of information treats all packets of information equally, but this could change unless Congress acts to prevent a move to a tiered service."

A tiered system of transmission would permit a substantial shift in Internet operations, allowing Internet service providers to charge the content creators. Thus higher fees would make content more available, since that content would be more accessible, but those paying lower fees would have access to their content downgraded, as Fitzsimmons put it, "to the slow lane of the Internet highway."

"Content created by organizations with deep pockets would rise to the top of a search, with the higher fees essentially enabling a content provider to 'buy' a higher position in a search," Fitzsimmons continued. "Content created by organizations with limited funding for such costs—community groups, schools and other educational institutions, non-profits, and the scholarly publishing field, for example—would be greatly restricted in having their materials available in the early stages of a search."

The commission takes the position that Congress should take action to assure the tiered access is prevented.

According to a study done under contract for the commission, the government has already taken a stand. In 1992, when Congress permitted commercial traffic on the Internet, the committee report on the legislation noted that the change did not alter the "goals or characteristics" of the network.

It has also been suggested that the Federal Communications Commission handle net neutrality in a regulatory manner, but a position has been taken by the FCC as well. In August, 2005, the FCC adopted and published four principles "to encourage broadband deployment and preserve and promote the open and interconnected nature of [the] public Internet." While the principles have no legal force and have not been codified, the FCC chairman stated at the time that these principles will be incorporated into the policymaking activities of the FCC. The four principles are:

1. Consumers are entitled to access the lawful Internet content of their choice.
2. Consumers are entitled to run applications and services of their choice (subject to the needs of law enforcement).
3. Consumers are entitled to connect their choice of legal devices that do not harm the network.
4. Consumes are entitled to competition among network providers, application and service providers, and content providers.

"The commission is in full support of the FCC's principles," Fitzsimmons said, "and we as a commission—with a statutory responsibil-

SLA Members Win International Awards

Rachel Kolsky, president of SLA Europe and manager of information resources with AIG in London, has been named Information Professional of the Year in the fourth annual International Information Industry Awards.

At the same event, SLA member Neil Infield and his Business and IP Center team at the British Library took home the award for the Best Team in the Academic and Public Sectors.

Hosted in London by Online Information 2006 and Information World Review, the awards offer the chance for the global industry to recognize the achievements of information teams, information and content management projects, vendors, and individual information professionals.

The top recruiter in SLA's 2004 membership campaign, Kolsky served on the Chapter Modeling Task Force in 2005-2006.

She has been a member of SLA since 1997. She is a member of the Business and Finance Division, serving on the Nominations Committee, and the Insurance and Employee Benefits Division.

In a September interview, she spoke of her experience with SLA. "We are a U.S. company and I am in constant daily contact with my opposite number in New York, so the fact that the SLA is a U.S. organization made sense," she told the IWR interviewer.

"In one swoop, I found I was part of a network of information professionals in Europe and also within the insurance industry, so it was a wonderful networking opportunity." (Information World Review. www.vnunet.com/information-world-review/features/2163529/transatlantic-collaborator. Retrieved November 30, 2006.)

Infield, senior business industry specialist at the British Library, became an SLA Fellow in 2006. He was president of SLA Europe for the 2003-2004 term. He received the Information Professional of the Year award in 2003, the ceremony's first year.

He is a member of the Business and Finance Division and the Information Futurists Caucus.

An SLA member since 1994, he chairs SLA's Public Policy Advisory Council.

He has been featured in SLA recruitment advertising. See www.sla.org/content/membership/join-sla/connect.cfm.

ity to advise the President and Congress in matters having to do with libraries and information science—respectfully encourage Congress to reiterate strongly the position it took when legislation permitting commercial traffic on the Internet was developed. Equal treatment of content is important to all information seekers. "

The NCLIS is a permanent, independent agency of the federal government charged to advise the president and Congress on national and international library and information policies, to appraise and assess the adequacies and deficiencies of library and information resources and services, and to develop overall plans for meeting national library and information needs.

web sites worth a click

RSSCalendar

www.rsscalendar.com/rss

Create a calendar for your site or blog. Share it with others, and even import events from other RSSCalendars. Enough said.

Library Terms That Users Understand

www.jkup.net/terms.html

Sometimes we forget that our users don't always know what we are talking about when we use words like "periodical," "pathfinder," "database," and "OPAC." John Kupersmith has compiled data, test methods, and best practices to help us use labels and terminology that will connect our clients with the information they need. How usable is your Web site?

Gliffy

www.gliffy.com

Who can pass up a tool that's "easy, free, and fun!"? Use Gliffy to create diagrams in your browser, including floor plans, flow charts, and wireframes for your Web site.

eConsultant

www.econsultant.com

An index to more than 2,000 Web development resources. If you're just getting started with RSS, blogs, podcasting, the Web 2.0 section will be particularly helpful. Numerous links to freeware utilities and everything you wanted to know about Firefox extensions.

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

The Learning Organization

By Debbie Schachter

Several years ago, as an MBA student, I had the opportunity to be introduced to the disciplines of organizational design and organizational development. In particular, I became interested in the concept of the learning organization. Perhaps it is not surprising that this form of organization would attract the attention of a librarian, given that it purports to embody an ideal state of information sharing within an organization—particularly in knowledge-based organizations whose value is based on their "human capital."

The learning organization values knowledge development as a natural byproduct of daily commercial activity. It encourages information sharing between individuals through a variety of formal and informal routes. It provides ongoing value to the organization through the stimulation of innovation, through the effective sharing of information leading to knowledge development. Because organizational learning may develop as an organic method in organizations rather than only defined as a set of planned strategies, it may have greater buy-in from employees than a specifically developed set of processes. Individuals make up the success of the learning organization as, naturally, they are the ones developing the information (and ultimately knowledge) networks.

The learning organization is one that values learning from mistakes as well as successes. Undertaking formal post-project reviews after both successful and unsuccessful projects is an example of structured organizational learning. Executive and management staff must also show that they are involved in continuous learning and committed to information sharing to improve the overall performance of the organization.

"The most successful learning organizations perpetuate their advantage by encouraging people at all levels to collect information across all boundaries, being sure that information is shared—not forgotten or hoarded—and encouraging casual information sharing as a way of organizational life." ("What Are Learning Organizations and What Do They Really Do?" *Chief Learning Officer*, October 2006)

The learning organization can encompass a wide variety of organizational designs. One of the most important features of any learning organization, however, is communication and information sharing through key information hubs. Like maps of the Internet, information sharing can be graphically described. The maps show how information sharing is characterized by hubs of information conglomeration. These staff-member "hubs" act not so much as gatekeepers but attract and share information based on their knowledge, their expertise, and their communication skills. These hubs are physical or virtual on the organization's major information trade routes. These forms are also similar to social networks where key individuals can be involved in various social networks, linking disparate groups through their involvement, and leading to enriched lives for all.

For the Info Pro

Librarians are an important part of the formalized structures in organizations that are or want to be learning organizations. Having a special library or information center is a positive sign that an organization is interested in fostering knowledge development through information sharing and education. In addition to the informal, it is essential to have some formalized structures to encourage the development of learning within the organization.

You can map information sharing in your organization to see where you fit on the information route. As an information professional, you are part of the formal information network. Ideally you are also the center of an important informal hub of staff at various levels. As an exercise, try to do a map that pinpoints where you are in relation to various key departments and key individuals within them. You will see that information sharing and knowledge development happens at identifiable points (people) within the organization. These are not always the individuals that are have the most authority or the

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 and in technology planning and support in a variety of non-profit and for-profit settings. She can be reached at dschachter@jfsa.ca.

most obviously pivotal roles. Personalities also lead to the nurturing or collaboration of various hubs.

Technology

Technology simplifies information sharing in an organization. But at the same time information overload can lead employees to tune out. E-mail messages, blogs updated daily or more frequently, Web-based information, telephone calls, all types of push and pull information services make access to information easy, yet contribute to the information overload. At the same time, employees working together in a physical space also have the person-to-person contact that is essential for information sharing. The water cooler conversation is an important component in information sharing, and to whom you talk or how you are involved in social networks at work all contribute to your access to information.

The library has to be on the forefront of providing information to its clients—both proactively and in response to requests. At the same time, information and knowledge development occurs outside traditional library resource services. Minimizing the "noise" of too much information becomes a key method for the information professional to be identified as an information node while at the same time a resource for specific requests.

As a knowledge manager, the librarian understands how essential access to information is for creating knowledge and value in an organization. So involvement outside of traditional library roles is essential for the librarian. The information professional is often involved in the early stages of project development with key teams or individuals, and this is important for developing the library's profile. But what about the importance of playing the role of a "structural enabler" ("What are Learning Organizations…") through specific involvement in follow-up and post project evaluations—those occasions that serve as essential learning experiences for the organization?

Just as managing by walking around is an excellent way to learn about what employees are doing or what problems they may encounter daily, the special librarian should be outside the library as much as possible to further the informal information networking. The development of this important informal role of information hub makes the librarian and the library a clearinghouse for ideas and organizational connections. The library as a meeting place (whether virtual or real) provides the opportunity for serendipitous learning that provides more value to organizations than can ever be calculated. We all know that it's important to get users into the library to use services and products, but it's also important to ensure that the library is the informal hub for information exchange between users, as well.

The information professional should model appropriate behaviors to help develop the learning organization. The librarian not only creates resources and access to resources but also enables clients to use them themselves. The librarian takes customer feedback and responds by improving, changing and adding services, products, and so on. The librarian should also know as much as possible about who is working on what project, and participate in making connections, as appropriate, between key individuals, as part of the offline network. Historically librarians have inherently participated in all of these activities. It is notable to realize, however, that these traditional library activities have become part of a broad organizational response to the clear competitive advantage of developing and sharing learning opportunities in the organization.

Structuring Information

Former Student Chapter President Lands Job with Disney

By Forrest Glenn Spencer

Among one of the many nondescript, gray buildings that dot the landscape in North Hollywood, California, you will find SLA Member Kathy Mirescu, the newly minted UCLA graduate who has recently embarked on her career in the information industry. She works in a type of office building that suggests nothing creative ever occurs inside, but it is one of the many places where creativity flourishes within the Magic Kingdom of the Disney empire.

The 28-year-old New Jersey native is employed at Walt Disney Parks and Resorts Online (WDPRO) as an information architect. She began her current position in July to develop wireframes, sitemaps and process flows, the essential blueprints that aid in communicating the functional specifications and interactive elements of Disney Web sites for such venues as Disneyland, Walt Disney World, Disney Meetings, Disney Weddings, Disney Cruise Lines, and Disney Vacation Club.

"I took an IA seminar in 2005," Mirescu recalled. "There were two instructors: Lynn Boyden, with whom I worked at Symantec as an intern, and Chris Chandler, who is the manager of information architecture at WDPRO. I took the class—which I loved—and I got to know Chris through the class. I saw him again … in March and heard there was a job opening, and I was encouraged to apply. It was a fortunate circumstance that this job came to me."

Mirescu works in the same building as the Disney Internet Group. Her IA team is small: 10 people, one based in Orlando. Mirescu sometimes has a challenging time describing her job exactly to people. Information architecture is new to the library science field, a fresh extension that is still defining itself and its place within the industry.

"I like to say that I'm a librarian masquerading as an information architect," Mirescu proclaimed. "Or, that I have the soul of the librarian but the exterior of an IA. Today, special librarians neither have to be librarians nor work in libraries. I do consider myself a special librarian because I am applying LIS skills and principles in a non-traditional way and in a non-traditional setting, which is the heart of special librarianship."

Architect and graphic designer Richard Saul Wurman coined the term "information architecture" in 1976. His idea was in response to the rise of the information industry—or the "explosion of data" as he called it then—and a need for structures and systems to enhance its use. Information needed architects, he said, to design such orderly systems. But with the expansion of the Web, a new type of architect was needed in the information field, to design the pages so Internet users can navigate effectively.

Mirescu said that she didn't go into LIS to become an IA, but there are elements of LIS in what she does that attracted her. Others on her team at Disney also have MLIS degrees.

Building a Framework

"What I often tell people in what I do," she began, "is to use a traditional architect as an analogy. Just as an architect develops blueprints for building habited spaces, so does an IA develop documentation for spaces in the Web environment. That's exactly what I do. Other people are responsible for the actual building of the sites—just like a construction contractor. I just develop the design details through analyzing and articulating what the ideal user experiences of the site should be, how the functional elements engender those experiences, and how to organize the site content in a way that helps users accomplish their tasks."

For example, when Mirescu was interviewed in August, she was working on designing an inline mini-site for Disney Cruise Lines. Specifically, it was for a sweepstakes promotion.

"IA deliverables articulate what the user experience is going to be like through the site and how the user is going to be interacting with the site and back-end system," Mirescu explained. "Specifically, I'll be creating documentation to explain what the information elements of each page are going to be and how the user is going to interact with them in various ways in order to enter the sweepstakes. There are all these different functional specs you have to map out, different criteria.

"An example: to enter the sweepstakes you have to be age 18 so you have to map out when the user enters their birth date, and if it doesn't recognize that this person isn't over 18, then there a page that says 'I'm sorry but you cannot enter the sweepstakes, etc.' That's one of the things I'm working on."

She is also working on another project for Disney Cruise Lines, listing pages for their cruises' shore excursions, developing ways to make these excursions better accessible to a user and making it easier for the individual to browse and search for information.

Mirescu uses Microsoft Visio and Macromedia Dream-

SLA Member Profile

Kathy Mirescu

Joined SLA: 2004

Job: Information architect

Employer: Walt Disney Parks and Resorts Online

Experience: Less than a year

Education: Bachelor's in Philosophy, Barnard College of Columbia University; MLIS, University of California at Los Angeles

First job: Communications assistant, California Community Foundation

Biggest Challenge: Effectively communicating to business stakeholders the value of user-research-based design decisions.

weaver as her primary software tools for design. MS Visio is the standard in the field in creating IA deliverables: wireframes, sitemaps, and process flows.

"Dreamweaver is used to create wireframes as lo-fi versions of Web sites," she explained. "These wireframes do not communicate visual elements or graphic designs. Dreamweaver is a big tool because it's an interactive way to communicate the overall site experience and the functional elements of the site. That's becoming more of the Disney standard because it's an easier way to communicate to business stakeholders that wireframes are living and breathing representations of future sites."

One of Mirescu's first assignments was for the Disney Vacation Club, which wanted to encourage people to buy or rent timeshares. "Disney wants to drive sales to two specific Vacation Club resorts and create a stand-alone site that would drive traffic to these resort sites, and ideally drive up sales," Mirescu said. "They explained to me what they wanted, giving me the goals and elements to be included on the pages, and then it's up to me on how it should be displayed and justify on how it will encourage users to buy or rent these properties."

The wireframes she creates are static pages that are delivered to the Web development staff. "It's an interactive process," Mirescu said, "because it will depend on what's possible on their end and what are their constraints. In theory, it's a linear process. In reality, it's much more interactive. If there's a problem, the Web development team will come back and say something like, 'What you're proposing is not possible, given these constraints, and you should rethink x or y.' I'll go back with their feedback and tweak the wireframes, and then it goes back to them."

Quick Start

Mirescu said that she was fortunate to find a job with a large corporation quickly. In the last two years, information architecture has been expanding as more companies have been catching on the need for IAs. For Mirescu, it was a good time to find work when she did.

"I went into UCLA expecting to become a librarian," she said. "My experience was a process of discovery of the options available in information science. The experience in the first year was very exploratory. What I love about UCLA was that the program itself provided a great foundation in traditional LIS principles but allowed me to explore the whole realm of information science and go beyond my own boundaries of what it means to be an information specialist."

She touted the benefits of being in Los Angeles to provide the internship programs and independent studies in a way she knew would be most beneficial. "I think for me, personally, that it provided enough flexibility to develop myself," she added. "One of the challenges is that it's left up to the student to discover how these LIS principles are being applied in the field. It's not made explicit to you in library school what the contemporary professional options are available to you; I thrived in that kind of open environment."

"She was a superlative student," said UCLA Professor Gregory Leazer. "She had a strong interest in information architecture and sought out all sorts of ways to follow up on her interest. Her classes were really quite incidental to all the learning she did while at UCLA, and she did a marvelous job of integrating her interests into coursework."

Her road to Disney began in New York, where she studied philosophy at Barnard College from 1997 to 2000. She held a brief student job at Barnard College's Wollman Library, but that's not what got her to becoming an information professional. After Barnard, she held various jobs, primarily in database management. It was an area she gravitated towards and held a series of similar jobs.

But what she found most satisfying was helping people find information.

She later spent a brief period in law school but she realized within her first semester that the law was not her line of work. The only class she enjoyed was legal research and writing.

"I got to know the librarians and the law library," Mirescu began, "and I just started to think, 'Hmmm, they help people find information for a living—wow, wouldn't that be cool if I could do that, too.' I left law school and the light bulb went off. I was happy in the library as a child and looked at all the jobs I had, and they all had to do with facilitating information access. That's how I got on the path in getting an MLIS."

Philosophy and LIS

Her philosophy studies introduced her to classification of information, to work within knowledge structures derived from the logic-based philosophy tradition. "There are many who have philosophy backgrounds in the MLIS informatics specialization. It's not unusual, as I thought it was. My own advisor at UCLA had a philosophy degree and my information retrieval professor at UCLA had a philosophy degree, too."

Mirescu headed west to Los Angeles for no reason other than to explore a different part of the country.

"I lived in the East Coast my whole life," Mirescu said. "I was attracted to UCLA because the city itself affords a lot of professional opportunities."

Her first job was with the California Community Foundation as a communication assistant. It was there that the technology bug struck her. "I was dealing with Microsoft Access databases, and I was terrified of them when I first started," she began, "because there was nobody willing to deal with it. The databases were a scary mess. It was a sink-or-swim incident. I had to figure out how navigate this database realm in order to do my job, which dealt partly with organizing donor mailings.

"I had a lot of resistance, because I didn't see myself

as that kind of person—and it turns out that I am that kind of person. When I realized how happy it made people to be able retrieve information faster and more accurately, that gave me a sense of personal satisfaction and it boosted my own confidence in terms of technical competency. There's where it started, the technology bug, and it grew from there, from that experience to where I am now at Disney."

Forrest Glenn Spencer is a Virginia-based independent information professional and journalist. He specializes in developing potential donor prospects for non-profit organizations and works with clients as an Independent Collector of Fine Researched Information. He can be reached fspencer@gmail.com

After a series of jobs in the non-profit field, Mirescu decided to pursue her Masters at UCLA in 2004. It was the same year she joined SLA. She was introduced to the organization at the school's orientation.

"There were representatives from the various groups at UCLA and they made pitches for their professional associations," Mirescu remembered. "I came into LIS from the legal world, and I was thinking at that time I would end up as a law librarian. So I connected with the president at UCLA SLA. I thought special librarianship was a diverse realm, and I was attracted by that."

Mirescu said she was impressed by SLA's focus on professional development.

"There was a speaker at an event who spoke on personal knowledge management," she cited an example. "There were many events focused on development of skills, as well as the résumé and job search process. There was also a strong emphasis on networking among special librarians. The events were diverse, which communicated to me the diversity of the information profession."

After a year at UCLA, she became president of the UCLA SLA Student Chapter.

"I really wanted to share with my classmates the diversity of options available to them in the information industry," Mirescu said. "Off the bat—from the beginning of the academic year—we wanted to provide for all the options available in special librarianship and choose a couple of specializations within the field, and then drill down a bit further on how certain types of special librarians function. The first event was a special librarianship panel that included various people: one librarian from the non-profit sector, an information professional from a headhunting agency, and another from Boeing."

After that, Mirescu and the other UCLA SLA officers organized a panel called Information Specialists in the Arts and brought in two professionals from the J. Paul Getty Trust, a solo librarian at the California African American Museum, and an art librarian from the City of Glendale Public Library. Later, she organized a health librarianship panel and a tour of the famed Huntington Library to provide her classmates an opportunity to see what it was like work in the rare books environment.

"There's definitely a strong arts and humanity leaning among UCLA LIS students," Mirescu said. "We wanted to respond to the inclination of our classmates, but we wanted to broaden their perspectives as well. There was a balancing act."

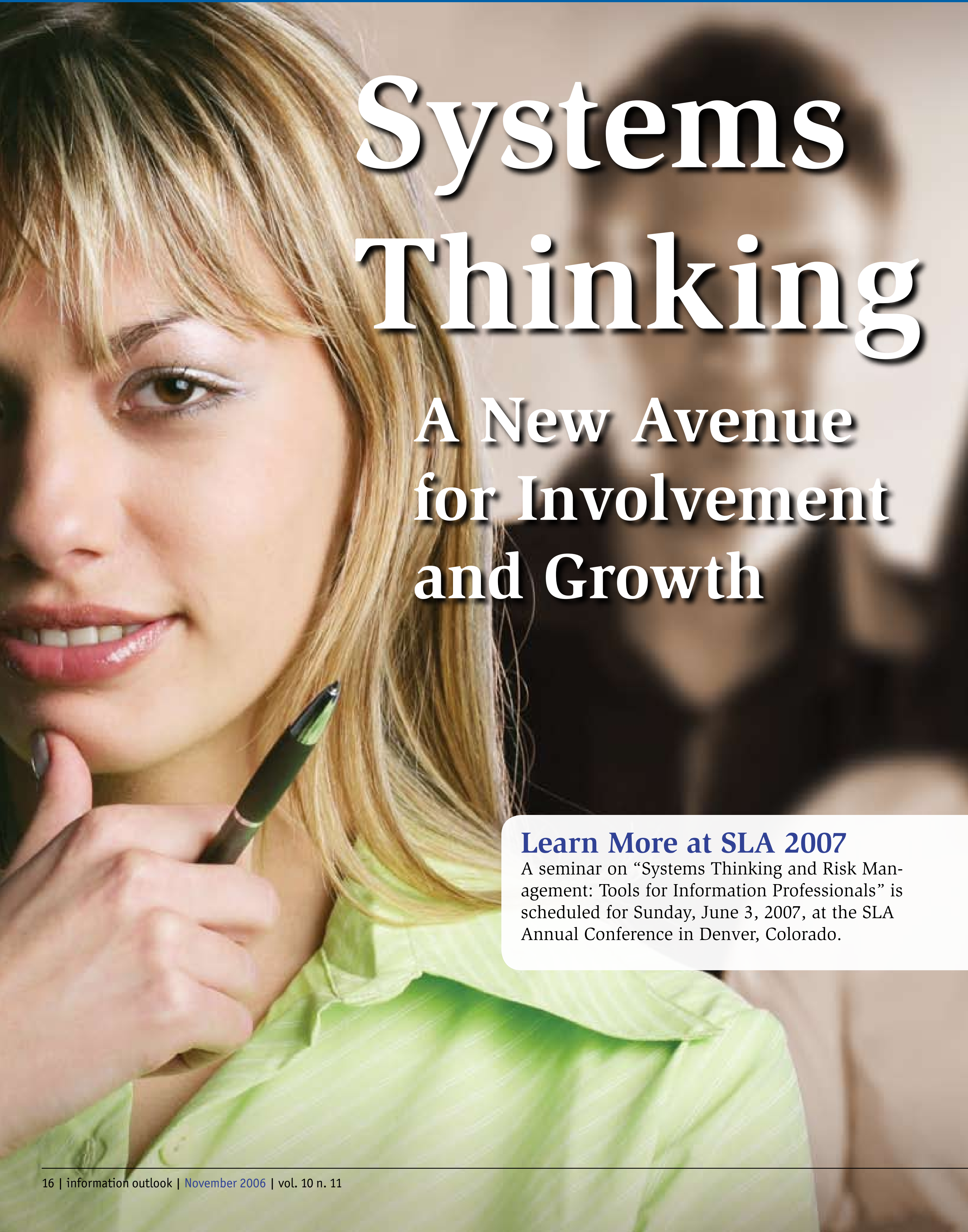
Mirescu organized about three events per quarter. Today, she's still connected to the UCLA SLA chapter and in close contact with one of the co-presidents for the 2006-2007 academic year.

SLA Southern California Chapter President-elect David Cappoli, who serves as the UCLA Student Chapter liaison, found Mirescu an enthusiastic individual who exposed the students in the programs to professionals in non-traditional roles.

"She tried to impart to those enrolled in the program that the student groups in information studies provided a way for them to understand the realities of the profession and to comprehend the roles that professionals play in a variety of environments," he said. "Students entering the IS program are often unaware of the opportunities and experiences that are available in the profession, and Kathy focused the chapter's efforts on showcasing the library and information profession as one moving forward and embracing technology and its possibilities."

"It's the networking component," Mirescu added, "the strong professional development focus of SLA that keeps and solidifies my ties with the organization, and that's something that developed as a student, and something that will be a benefit to me as a professional."

While Mirescu has just embarked upon her career, she is considering where it will lead. "I'm interested on focusing a bit more on interaction design, specially dealing with user-centered interface design as a method of increasing usability. I can see myself as an interaction designer, but sometimes that title and IA title are interchangeable. It depends on the context. I find myself gravitating towards interface design, whether that's Web site or software or any kind of digital realm. I'm open to the possibilities."



Systems Thinking

A New Avenue for Involvement and Growth

Learn More at SLA 2007

A seminar on "Systems Thinking and Risk Management: Tools for Information Professionals" is scheduled for Sunday, June 3, 2007, at the SLA Annual Conference in Denver, Colorado.

By Lorri Zipperer and Sara Tompson

A solo librarian in a mid-sized product development consulting firm is routinely faced with service problems due to lack of support and increasing requests for his professional services. The problems result from a change in behaviors of the professional staff. This group has been engaged in more continuing education, and the staff members have been doing more primary research in response to a leadership challenge to improve their own knowledge base, and thereby improve their professional status.

One Friday, upon receiving an expedited instant-message request from one of the firm's top-performing consultants for 15 articles to be obtained and delivered right away, the librarian responded that it is the information center's policy that staff obtain articles themselves through the digital library. The consultant—a library champion and frequent user—was not at all pleased with this response and arrived in person at the information center to express her discontent. She is an extremely busy professional who has a complicated travel schedule and notoriously demanding clients. The librarian proceeded to try to train the consultant on how to find, download, and print the materials directly from her PDA. However, this approach just added fuel to the fire—the consultant did not understand why the librarian would not simply get the articles for her.

Middle management at the organization had put up some resistance to the information center's new self-service model, but they had accepted it begrudgingly. Managers are still heard around the water cooler complaining about it and saying that they tend to read less as they feel it is such a hassle to find and print their own materials. As news of what some staff members considered his refusal to help them has spread through the consultant ranks, the librarian has found that requests for document retrieval have dropped off, which is what he wanted. However, invitations for the librarian to participate on product development teams and become involved in innovation activities have dropped off as well.

The librarian had designed the digital library with efficiency in mind, to enable staff at all levels to access materials any time of day. However—because he felt professional staff didn't have the time or interest to engage in the process—he didn't involve anyone else in the planning and set up, or in projecting its effect on existing services. If he allows staff to call on him for routine research, his more critical and specialized services would delayed. Therefore, he decided to stand firm on the self-serve policy.

Systems thinking might have helped prevent the problem.

What Is Systems Thinking?

Systems thinking is a means to deeply understand and recognize the interconnectedness of roles and services in organizations. Systems thinking was introduced to a widespread audience by Peter Senge in *The Fifth Discipline*; it is built upon both systems engineering and organizational psychology tools (Senge, 1990). Systems thinking enables one to see how an individual's activities affect the larger environment (Sterman, 2006). Systems thinking facilitates a shift away from blaming individuals or departments—IT and demanding staff (as illustrated in the opening scenario) are common scapegoats for librarians—to look at how an entire organization may be contributing to a problem (Goodman, 2006).

The goal of systems thinking is to ensure that strategies are built to optimize and fully respond to interactions within organizations, rather than making them confrontational and thus less effective. Systems thinking enables a mature understanding of the interaction between entities—that is, individuals, departments, and business units—within an organization. These interactions produce behaviors that feed back into the overall work processes and output of the organization. This analysis centers upon breaking down organizations and issues into component parts, a key aspect of the systems thinking approach, and can result in strikingly different conclusions than those generated by traditional forms of analysis, especially when what is being studied is complex or has a great deal of feedback from other sources, internal or external.

Adoption of a systems thinking approach can position information professionals to work more effectively in their respective organizations. Systems thinking requires asking "*Why?*" more often than may seem normal. Systems thinking also requires digging deeper to learn the root causes of problems, and it requires building multidisciplinary relationships. Through these new ways of analyzing and interacting, a systems-thinking information professional can:

- Minimize risk.
- Realize sustainable programs and improvements.
- Highlight goal-oriented contributions through strategic insight and observations.

Systems thinking has been embraced by innovators in health care in the quest to reduce medical error (Leape, 1994). Information professionals have recently noted the value of seeing information and knowledge transfer from a systems thinking perspective (Corliss, Tompson and Zipperer, 2005). However, thus far no empirical evidence has been gathered to determine whether systems thinking is used in, or resonates for, librarianship.

To address this evidence gap, the Systems Thinking Perspectives: Innovation in Knowledge and Information Delivery assessment program was launched in 2005. The work builds upon several projects by overlapping researchers, including work to understand the librarian's role in patient safety and other broader-based educational programs for librarians (Zipperer and Sykes, 2004; Zipperer, Corliss and Tompson, 2005.) The project Web site—www.sla.org/division/dbio/Systems—provides tools to explore one's acceptance and application of systems thinking behaviors both at a "community of practice" level and within one's own organization. The Systems Thinking Perspectives Web site is hosted by SLA's Biomedical and Life Sciences Division and was funded by a 2004 SLA Endowment Fund grant.

Systems Thinking and Librarians

A primary goal of the Systems Thinking project was to help information professionals see the myriad of interactions that are at play in what may appear, on the surface, to be straightforward workplace transactions. The project sought to get a snapshot of how information professionals view themselves in the context of systems thinking behaviors. An online assessment tool was used to collect data from the field.

The assessment tool was distributed to begin to quantify librarianship's adoption of Senge's systems thinking behaviors and help information professionals "walk the talk" of the systems thinker (Senge, 1990). The availability of the assessment tool was announced on various SLA and information professional electronic discussion lists, written up in newsletters, and mentioned in educational forums on the topic to raise awareness and increase response.

The assessment was designed to stimulate reflection on:

- How information professionals view themselves in relation to their organizations.
- How personal philosophies enhance one's ability to contribute to the overarching goals of the organization.
- How work behaviors play a part in learning, growth and change management.

The tool focused on behaviors that support a systems thinking perspective in four key areas as defined below.

- **Interconnectedness.** A system is a group of interacting and interdependent components that form a unified and more effective whole. Systems thinking emphasizes the relationships among a system's parts, rather than the parts themselves.
- **Partnership and leverage.** Partnership involves respecting co-workers and encouraging them to believe that they can contribute to solutions. Tapping the insights and knowledge of all persons in the community facilitates opportunities to leverage experience, resources, and expertise to produce the best organizational decisions and results.
- **Personal mastery.** Individual learning is a key component of personal mastery. It involves defining a clear vision of what one wishes to achieve and then setting a goal to accomplish it.
- **Discussion and dialogue.** Inquiry, conversation, listening, and understanding in an atmosphere of trust and respect can lead to breakthrough ideas and creative energy. Dialogue and discussion don't just happen. They generally need to be orchestrated through conscious efforts to build an opportunity and to prepare personally for this level of exchange.

Individuals who took the assessment were instructed to reflect on their style of working with others. This direction toward introspection was intended to encourage individuals to embrace systems thinking. In a further effort to make systems thinking more clearly applicable to information professionals, the project team set up a "crosswalk" with the SLA competencies (Competencies for Information Professionals, 2003). These links make analogies between some key and well-understood competencies concepts and systems thinking tools and views. In addition, the tool and the site were arranged to make it easy for participants to learn more about systems thinking through materials made available on the site and through peer discussion, facilitated by the blog. The researchers hoped that after individuals took the assessment tool, they would then employ systems thinking methodologies to interact more effectively with their environments from a proactive and innovative platform.

What We Learned

As of September 1, 115 respondents had completed the assessment. The tool remains available online (at www.surveymonkey.com/s.asp?u=88692854536) and it is expected that some additional responses will be received because of this article and other systems thinking discussions.

The data from the responses thus far indicates that librarians view themselves as exhibiting key systems thinking behaviors, as discussed below. The tool ranked participants' levels of agreement with statements about key systems thinking paradigms.

- **Interconnectedness.** 80 percent agree (strongly agree and partially agree combined) that they view their work as part of many networks. Increasingly, information professionals and librarians are attuned to organizational objectives and priorities and attempt to align their priorities with organizational initiatives.
- **Partnership and leverage.** 71 percent agree that this is part of their jobs. Information professionals understand that effective interaction with other departments and other professionals is crucial to their success.
- **Personal mastery.** 75 percent agree they exhibit this level of self-awareness. Overall, information professionals are quite positive about their engagement in sharing knowledge and in encouraging others to share knowledge.
- **Discussion and dialogue.** 86 percent agree they regularly do both. There are more "strongly agree" responses in this section than in any other sections of the survey.

The sum of the "not sure and disagree responses" are:

- **Interconnectedness.** 32 percent don't actively participate in planning in general, or planning for new initiatives.
- **Partnership and leverage.** 37 percent can't easily identify key stakeholders.
- **Personal mastery.** 38 percent don't spend time around their clients to understand their information needs.
- **Discussion and dialogue.** 19 percent don't actively facilitate a non-threatening environment when seeking solutions or exploring opportunities for improvement.

Discussion

Information professionals must be good communicators to succeed. Two of many illustrations of this necessity include the reference interview—a structured communication technique that is core to the profession—and the fact that librarianship is a service profession and as such requires interactions with many people. Therefore, it is not surprising that the assessment results indicate high levels of agreement for the systems thinking practice of discussion and dialogue.

The low number of "agree" responses to the interconnectedness question about planning indicates lost opportunities for many information professionals to affect and drive information and knowledge sharing strategies at the organizational level. Being involved in the planning of organizational initiatives is an important way to have a broader and more effective impact on the overall organization and its information use.

The fact that close to 40 percent of the respondents don't strongly identify with stakeholders in their organizations is troubling. As a profession, librarians should explore how communications with other members of the organizations, especially with thought leaders and decision makers, can become more proactive and strategic.

While the majority of respondents to the Systems Thinking assessment agreed they are consciously focused on opportunities for dialogue and discussion, close to 20 percent said they are not. It is likely that for most adults the notion of building dialogue into busy schedules can be a challenge, partly because of time constraints. This reluctance may also partly arise from discomfort at: replaying difficult conversations, actively soliciting others' points of view, or working with others with whom one has had difficulty in the past to achieve outcomes that are more satisfactory in the future. Nevertheless, these are the sort of conversations that information professionals should initiate to become more successfully integrated into their organizations.

Given the limited response to the assessment as announcements of the program and the tool availability were distributed to the SLA membership at large (with a targeted focus on the Biomedical, Engineering, and Leadership and Management Divisions and the Illinois Chapter) the authors considered that the numbers may reflect the "Lake Woebegone" effect: Only those who are "better than average" in systems thinking areas completed the survey. Also, there was significant drop off (one third) in responses after the first set of questions. This drop off may have occurred as the respondents' desire to self-assess dissipated or because the assessment was seen as too long or too challenging, or no longer of interest.

Applying Systems Thinking

This question of how librarians can apply systems thinking—which spurred the project and the assessment tool at the core of it—still needs to be addressed. Looking back at the scenario that opened the article, some systems thinking perspectives could be applied that could prevent, or mitigate, the isolation and ineffectiveness the librarian was starting to experience.

A systems thinking analysis would reveal that the librarian chose a quick response to a tough situation but did not consider the unintended, long-term consequences on the library or the staff and the organization—the other parts of the system with which the library was involved. A bigger-picture response to his frustration as a solo librarian who was asked to help move initiatives forward, but also was overwhelmed by article retrieval tasks, could have provided alternatives. In addition to keeping the interconnectedness of the firm in mind, his adoption of a systems thinking perspective could enable him to leverage partnerships, initiate discussions and dialogues, and become a

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The authors would like to acknowledge the SLA Endowment Fund committee and the SLA Biomedical and Life Sciences Division for their support of this effort and Jan Sykes for her work on the SLA-funded project and her assessment and compilation of the survey results. For a complete review of the data or to take the assessment, visit the project Web site at www.sla.org/division/dbio/Systems.

better master of his professional self.

Briefly, these four principles could have been applied as follows:

• Interconnectedness

- The librarian could present service levels and priorities to the staff to illustrate the impact of article demands upon a variety of units and individuals engaged in moving the firm forward.
- He could involve a variety of staff from various departments to ensure buy-in of the new self-service approach.

• Partnership and leverage

- The librarian in the scenario could build a multidisciplinary team to work on the structure of the digital library and its services, which would both ensure buy-in and garner him some willing partners for implementing it.
- The relationships built by these sorts of interactions could leverage the librarian's "capital" within the firm—raise the profile of the information center and highlight his professionalism.

• Personal mastery

- Part of personal mastery is continually learning how to see current reality more clearly (Senge, 1990). The librarian could do this by seeking to understand the consultants' work and knowledge sharing activities more clearly in order to best design services and staff outreach
- Work with instead of against the creative tension between current reality and his vision of a digital library, by, for instance, being candid about his plan with management and the consultants—his customers, and educating and advocating to get their buy-in.
- Set goals to achieve a deeper understanding of the long-term expectations of his organization and how they fit his personal career vision.

• Discussion and dialogue

- The librarian could have invited the consultant to discuss the situation and brainstorm about solutions for the future, including ways to require some level of self-service without making inappropriate demands of the users' time. The librarian should pick up the tab!
- The librarian could be a proactive facilitator, and bring together the consultant and middle management staff to talk to them about their needs and then act upon what was learned.

Plans

This SLA-funded assessment project was one of the first, if not the first, effort to obtain some data on information professionals' views of themselves as systems thinkers. As systems thinking is still very new to the profession and the library literature , the tool also served as an introduction to systems thinking for many of the respondents. The data should be considered preliminary. Nevertheless, the project successfully identified big-picture perspective gaps in many of the respondents' world views, where a systems thinking approach could serve as an important bridge.

The authors, in collaboration with various partners, are working to introduce systems thinking more broadly to the profession. A systems thinking continuing education course with a risk/benefit approach, based in part on successful systems thinking models in the health care arena, will be delivered at the 2007 SLA Annual Conference in Denver. Several possibilities for peer-reviewed articles on systems thinking in librarianship are under consideration.

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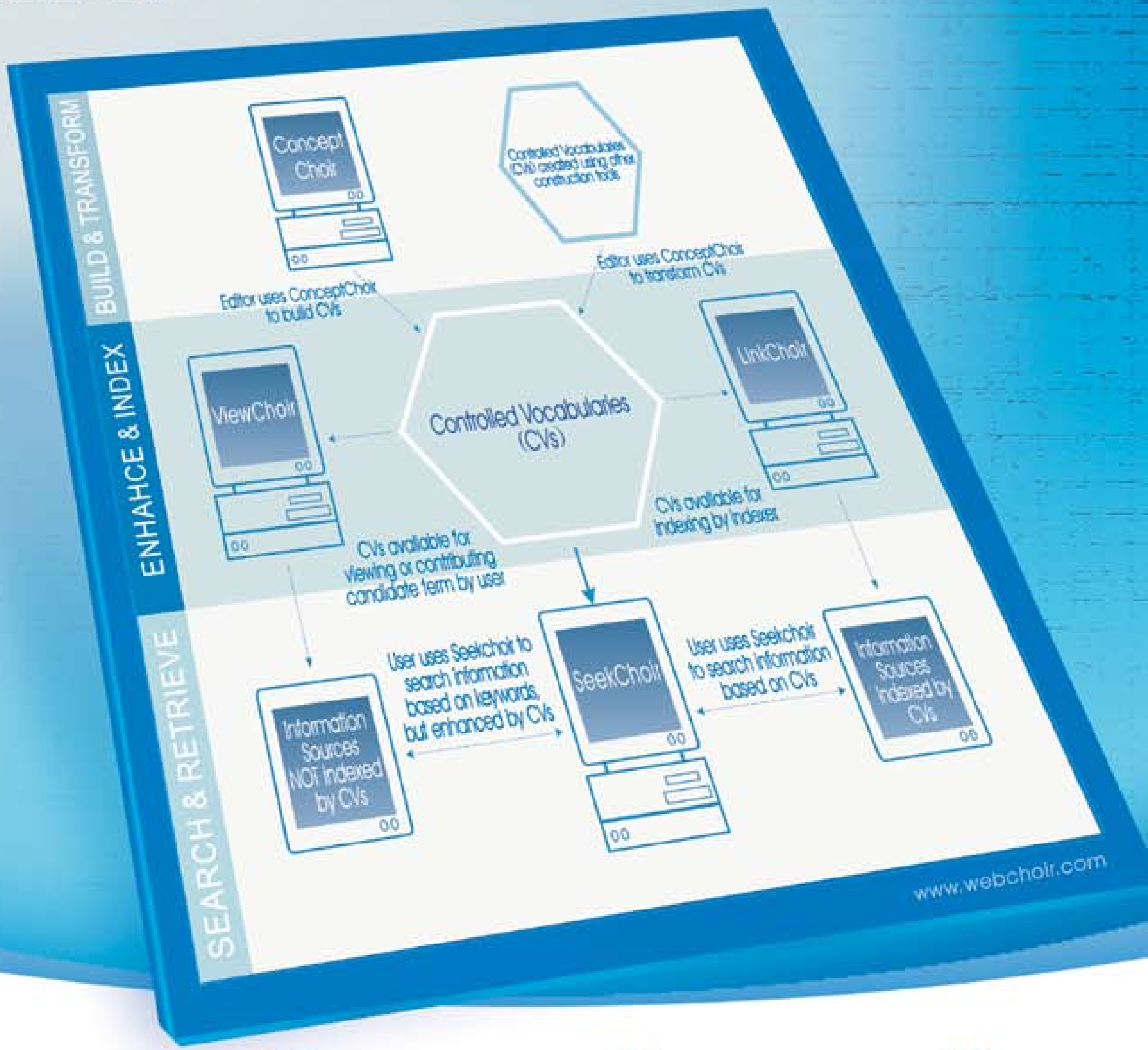
WebChoir



ConceptChoir

ConceptChoir provides an exhaustive range of tools to develop controlled vocabularies (thesauri, classification schema, topic maps, etc.) inexpensively and efficiently, and easily to transform any controlled vocabularies into browsable and linkable hierarchies. ConceptChoir constitutes the first tier (Build and Transform) of WebChoir's three-tier end-to-end solution.

ViewChoir

ViewChoir easily supports publication of thesauri and other controlled vocabularies (CVs) on the Internet/intranet/extranet or on a CD, to enable the users to participate in collaborative building of controlled vocabularies with their candidate term submissions to enhance CVs and to greatly expand user capabilities in Internet/intranet/extranet searches through utilization of browsable CVs.

LinkChoir

LinkChoir enables integration of any browsable controlled vocabularies created or transformed by ConceptChoir with a variety of information sources by linking the terms in your CVs with fielded records in your data warehouses. ViewChoir and LinkChoir form the second tier (Enhance and Index) of WebChoir's three-tier end-to-end solution.

SeekChoir

SeekChoir enables creation of simple to complex search strategies to retrieve precise information throughout the Internet/intranet/extranet and/or data warehouses using keywords and/or browsable XML-based controlled vocabularies that are created or transformed by ConceptChoir. SeekChoir makes up the third tier (Search and Retrieve) of WebChoir's threetier end-to-end solution.

Enterprise Vocabulary Server

XBRL Changes Financial Reporting

By Louise A. Klusek

Anyone who has been following developments at the Securities and Exchange Commission since the appointment of Christopher Cox as chairman knows that he is a champion of investor education. He has promoted the use of plain English to remove legalese from SEC documents. He has made the SEC's company filings and mutual fund reports fully searchable on the Web. He has spoken frequently about the need to give investors the tools they need to make informed investment decisions. This September he announced that the SEC intends to invest in an interactive data system that will make real-time search tools available to investors.

What is Interactive Data (XBRL)?

"Interactive data" is another term for XBRL or eXtensible Business Language Reporting. XBRL is essentially a classification system that uses metadata for financial reporting. It was developed as an open standard by a non-profit consortium, XBRL International (www.xbrl.org). The consortium—composed of more than 450 companies, organizations, and government agencies—promotes the development and use of XBRL and freely licenses it to anyone. Under development for more than five years, XBRL has the capability to alter how investors, analysts, and regulatory agencies access and use corporate reports. Moreover, it has the potential to provide a uniform standard for the electronic distribution of corporate reports not only in the United State but also worldwide.

One analyst/consultant compares XBRL's effect on financial reporting to the Dewey Decimal System's effect on libraries. Simply put, XBRL enhances the analysis and sharing of financial information. It offers advantages to a wide variety of financial-data users, from the ordinary investor, to buy-side and sell-side analysts, to the reporting company itself. Librarians who deal directly with investors will be working in a new data-enhanced environment. Librarians who work in corporations, banks, or accounting firms will see their work streamlined by new desktop analysis tools.

How Does It Work?

We are used to seeing information presented in documents that use HTML to control how data looks on a Web page. But Web sites also employ another meta language called XML (eXtensible Markup Language) consisting of tags that describe data so that it can be read by various software applications. Data is tagged so that static documents can function as interactive reporting tools. XBRL is an extension of XML created to conform to the requirements of financial reporting.

Librarians might best appreciate XBRL if they understand it as metadata (data that provides context for data) specifically developed for financial statements. XBRL is based on a standard computer language that tags all elements of a given financial statement to a taxonomy or data dictionary. The tags surround the data with context, providing information about what the data represents, where it comes from, and why it is useful.

In XBRL, taxonomies go beyond simple description of discrete items. XBRL taxonomies define relationships *between* items (as a mathematical formula or a reference to a standard, for example). For example, any number in a financial statement will be defined in the taxonomy and will be recognized in any XBRL application. Non-numeric information is also tagged so that, in addition to other materials, accounting policies, compensation information, or information in the Management Discussion and Analysis (MD&A) are identifiable and retrievable. Taxonomies also include text labels in multiple languages that make it possible to "read" financial statements written in a foreign language. A financial report written in Chinese or Japanese, for instance, can be "read" in English if the report has been tagged in XBRL. XBRL is also extensible, which means that filing companies can extend the taxonomies for their own industry-specific or even company-specific needs.

Accounting Standards and XBRL

In the United States, accounting bodies have been key players in the development of XBRL taxonomies. Charles Hoffman, the acknowledged father of XBRL, conceived the idea and worked on the first prototype open standard in 1998 in cooperation with the American Institute of Certified Public Accountants (AICPA). In addition to AICPA, XBRL has the support of the Institute of Management Accountants, and the Financial Accounting Standards Board (FASB). Accounting bodies worldwide believe that XBRL will reduce accounting complexity and enhance the use of accounting standards.

As adoption of XBRL becomes widespread, the dissemination of financial information will radically change. Librarians who work with financial information will be working in a new environment.

XBRL-US—originally a volunteer committee of AICPA and now an independent not-for-profit organization—is leading the development of taxonomies for US GAAP (Generally Accepted Accounting Principles). Taxonomies for US GAAP are available today for several industry sectors: Commercial and Industrial, Banking and Savings, Insurance, and Investment Management. Taxonomies are not yet available for all industries; and, for some industries, they are still immature.

Certain industries, like oil and gas, will require taxonomies with greater depth of detail than what is currently available in the US GAAP Commercial and Industrial taxonomy.

Other entities with particular reporting needs, such as conglomerates, will need to develop their own sets of custom extensions. The good news is that XBRL-US has just received a $5.5 million dollar contract from the SEC to complete the taxonomies for all US GAAP-based filers.

International XBRL

Taxonomy development is not limited to the United States. The International Accounting Standards Board (IASB) is developing a taxonomy reflecting International Financial Reporting Standards that will make cross-border reporting of financial information easier. To promote the adoption of XBRL, the European Commission is currently sponsoring a two-year development program with XBRL International called "XBRL in Europe." The program's first project is to work with the Committee of European Bank Supervisors (CEBS), an advisory body to the European Commission, to develop a taxonomy that will be freely available to national regulators and EU credit institutions. Taxonomies are also actively under development in Australia, Canada, China, Germany, Ireland, Korea, New Zealand, and the United Kingdom.

Other countries are ahead of the United States in adopting XBRL for corporate reporting. Worldwide, the XBRL movement has support from stock exchanges in Madrid, Tokyo, Seoul, and Shanghai, where company reports are already filed in XBRL.

Product development will move away from storage of information and the building of document repositories to real-time interactive management of financial information.

In the United Kingdom, Companies House is receiving XBRL-tagged financial statements from all audit-exempt companies, a group that represents 75 percent of the companies registered in England and Wales. Companies House expects to have more than 50,000 filings in XBRL by the end of 2006. The tax authorities in the U.K. and the Netherlands are building systems for collecting corporate tax returns in XBRL. By 2010, all corporate tax returns in the UK must be filed in XBRL. The national banks of Spain, Germany, and Belgium also have XBRL initiatives in place.

Banking and XBRL

The largest implementation of XBRL in the United States has been in the banking industry where the Federal Deposit Insurance Corporation (FDIC) has mandated that all banks submit their quarterly call reports in XBRL in a program that began in October 2005 (www.ffiec.gov/find). Other members of the Federal Financial Institutions Examination Council (FFIEC), the Federal Reserve, and the Office of the Comptroller of the Currency have joined the FDIC in building a shared depository for XBRL call reports (the Central Data Repository) where more than 8,000 reporting institutions now file.

The FDIC was able to implement XBRL quickly because it already had created a defined data set for its call reports and had developed relationships with major software vendors who had leading banks as customers. The FDIC simply asked the software vendors to create an interface that incorporated XBRL. Banks didn't have to make internal changes to their IT systems or their general ledgers. No manual intervention was needed. The new software has the capacity to map banking data to the new XBRL definitions and is programmed to report errors before a report is submitted.

The objectives of the FDIC's Call Report Modernization Program are to improve data quality as well as improve the efficiency of the collection and dissemination of call reports. An FFIEC white paper reported significant benefits after just one year of operation: data cleanliness improved from 66 percent to 90 percent, data accuracy from 70 percent to 100 percent—and reports were processed in hours not weeks. Productivity of the analyst staff increased 15 percent (Federal Financial Institutions Examination Council, 2006). Based on these successful outcomes, the FFIEC is working to expand the program to cover reports from all its member banks, thrifts, and credit unions. It is also in discussion with the Federal Crimes Enforcement Network to use XBRL reporting in its anti-money-laundering program.

The SEC and XBRL

Recently, the Securities and Exchange Commission (SEC) initiated a pilot program, the XBRL Voluntary Filing Program (VFP), which invites companies to voluntarily file reports to EDGAR in XBRL format. As of June, 24 companies were participating in the program, including well-known names such as Microsoft, General Electric, Pfizer, PepsiCo, and Xerox Corporation. Microsoft was the first company to submit full financials in XBRL (December 2004) when it filed its 10-Q with notes and MD&A. In September 2005, Microsoft filed the first XBRL 10-K report, for the year ending June 30, 2005.

The SEC pilot XBRL program is open to any company or mutual fund that files with the SEC. Participants can choose to tag the 8K or any other financial document. They can file the XBRL-tagged document as an exhibit to the official filing or as an after-the-fact amendment. The SEC is offering incentives to volunteers in the form of expedited review of their registration statements and annual reports.

Participating companies agree to file reports with XBRL tags for at least one year and give feedback to the SEC on their experience. The VFP gives the SEC information they can use to assess the benefits of XBRL technology. It also gives companies the opportunity to learn how XBRL can benefit them, and it gives users the chance to experiment with tagged data.

As noted earlier, SEC Chairman Cox is an ardent supporter of what the SEC refers to as "interactive data." The VFP is only one part of the SEC's commitment to interactive data. On September 29, the SEC announced it would spend $54 million to update its EDGAR database, finance the completion of additional XBRL taxonomies, and provide interactive tools that will allow investors to use interactive data. The new EDGAR system will be completely interactive and allow users to search for information in SEC documents and download the information into applications software. Users will also be able to get real-time streaming data with RSS feeds. Information on the VFP program and links to the chairman's speeches and public statements on XBRL are part of the "Spotlight—Interactive Data" feature on the SEC Web site at www.sec.gov/spotlight/xbrl.htm.

Mutual Funds and XBRL

In March, the Investment Company Institute (ICI) announced it would begin developing taxonomies for mutual fund disclosure that will tag all data in the risk/return summary found at the beginning of every mutual fund prospectus. The risk/return summary, introduced in 1998 by the ICI to help investors compare funds, is probably the most important part of the prospectus for investors. It contains the particular fund's investment objectives, investment strategies and risk characteristics and includes data on past fund performance and the fund's fee table. The ICI wants to take advantage of the Internet to offer a new approach to fund disclosure. An XBRL-embedded fund summary will give investors data they can use to evaluate and compare funds, while at the same time making available detailed financial information from the prospectus.

Suggested Readings and Web Sites

The SEC Web site features a "Spotlight On: Interactive Data and XBRL Initiatives" at www.sec.gov/spotlight/xbrl.htm. It includes SEC Releases, speeches by Chairman Cox and others, and transcripts from the Interactive Data Roundtables.

XBRL International Inc (www.xbrl.org) is the business consortium promoting XBRL. Their Web site has news, educational materials, and interactive demos showing how XBRL works. Go to the XBRL-US Web site (www. xbrl.org/us/) for the US-GAAP taxonomies and white papers and resources specific to US-XBRL.

The AICPA's Center for Public Company Audit Firms includes information on XBRL initiatives for accountants (http://cpcaf.aicpa.org/Resources/XBRL/).

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Neal J. Hannon writes a monthly column on XBRL in Strategic Finance magazine. Hannon is former chair of XBRL International's Education Committee.

The documents filed by participating companies are available at www.sec.gov/Archives/edgar/xbrl.html.

The Data User and XBRL

XBRL offers advantages for users of financial data, including librarians, that are summed up in the words of Ernst & Young and Morgan Stanley as "better, faster, and cheaper" (Penler and Schnitzer, 2003). Improved accuracy, accessibility and timeliness as well as cost savings are predicted for all players in the business information supply chain, from producers to users. Adopting XBRL will require substantial changes for filing companies, but they will have the greatest potential to garner benefits from XBRL.

Mike Willis, founding chairman of XBRL International, says that "XBRL can reduce the costs associated with the production of financial reports by 30 percent to 70 percent" (Tad Leahy, "XBRL: Coming of Age," *Business Finance*, December 2005, 3). He believes that companies can realize performance-related benefits because a single data set of XBRL can be used for both internal and external reporting. For companies that report to multiple regulators, additional savings will be realized.

The ease with which data can be published and used will revolutionize investor relations. Currently, most companies make reports available on their web sites in PDF format. This is good for archival purposes but is not useful for extracting data for analysis. Because XBRL data can be easily retrieved, integrated, and packaged at a low cost, investor-relations staff will have opportunities to highlight data by publishing it in a variety of formats that they think suitable for investors, analysts, or other stakeholders.

Professional analysts will benefit in time savings and increased productivity. PricewaterhouseCoopers reports that analysts spend 80 percent of their time gathering data and only 20 percent actually analyzing data (Gee and Lee, February 2006). Even with so much attention paid to the acquisition of data, the data that ends up in analysts' models can have an error rate of 28 percent or higher (Cox, March 3, 2006).

With XBRL, analysts will have cleaner data. They will also have the source materials to build new valuation models and better portfolio analysis tools. In terms of scope, they will have easier access to financial data from international companies and U.S. small-cap companies so that it will be possible to increase the number of companies they cover.

Dan Roberts, chair of the XBRL-US Steering Committee, says, "The easier it is for the analyst to import the information into their models, the greater the chance the company has of either being covered or being a comparator in industry-wide statistics" (Neal J. Hannon, "In Search of ROI for XBRL," *Strategic Finance*, March 2006, 60).

XBRL adoption also facilitates regulatory analysis. The FDIC reports that since the start of their Call Report Modernization Program the number of reports requiring manual review has been reduced by about half. Banks are using XBRL as part of their internal review process to detect and correct data errors and to validate their financial information before it goes to the FDIC regulator.

Because the use of XBRL speeds up the publishing cycle, reports have the potential to be available in "real time." Users no longer will have to wait 30 days after the end of the quarter for a bank's call report. With electronic filing, call reports are now available as soon as the banks file. The FDIC also has access to aggregate data sooner, and its own publishing program has been speeded up.

Worldwide adoption of XBRL will protect investors and promote growth of global markets by increasing transparency. Transparency is more than making financial reports easy to read with plain English; it requires making data easy to use for the ordinary investor who has often been limited by the cost of, or access to, financial data. Both SEC Chairman Cox and Marc E. Lakritz, president of the Securities Industry Association, are promoting the benefits of XBRL financial reporting for investor education.

To encourage investors to make informed investment decisions, the SEC is developing free tools for the new EDGAR. Investors will have access to more of the information they want in the way that they want it. Cox, in announcing the SEC's XBRL project, said he expects the new EDGAR to enable investors to assemble their own financial data without being restricted by forms like the 10-K, 10-Q or 8-K. Users will have not only searchable and retrievable documents but searchable and retrievable data from within those documents. The value of quantitative data available to investors will increase as that data becomes more accessible.

Adoption of XBRL

Adoption and widespread use of XBRL in the United States is largely limited by technology, especially in the development of complete taxonomies for all industries. Access to existing reports filed in XBRL requires, for the time being, special software (try opening one of the VFP reports without it). In the near future, however, access will no longer be an issue. The new EDGAR under development will give investors free access and basic analysis tools. The next version of Microsoft Office, expected in 2007, will have "native XML capabilities" which will also facilitate use of XBRL.

Financial information providers are already starting to disseminate EDGAR filings in XBRL format. EDGAR Online is one provider that has developed XBRL analysis tools with XBRL-tagged documents. EDGAR Online has recently converted the financial statements of all public companies in its database into XBRL format and tagged 75 data items from the balance sheets, income statements, and cash flow statements of these companies.

It now provides eight years of annual data and 32 quarters of 10-Q filings in XBRL. The I-Metrix product allows users to download these EDGAR documents (or any XBRL-tagged document) to a spreadsheet or a selected financial model and use the XBRL-tagged information to analyze company data

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over several years, or to compare a company to its competitors or an industry group. I-Metrix is a dynamic spreadsheet: from any cell, users can access the source document, the XBRL definition, and the data description.

XBRL also has the support of software companies like R.R. Donnelley, UBmatrix, SavaNet, and Rivet Software that offer products to companies that want to tag and file documents in XBRL. As more software tools become available, more companies will adopt XBRL. Mary Knox, an analyst at Gartner, predicts that XBRL will "hit a decent market penetration—that is, 20 percent to 50 percent of U.S. public companies—within the next two to five years" (Leahy, 5).

XBRL and Business Reporting

As adoption of XBRL becomes widespread, the dissemination of financial information will radically change. Librarians who work with financial information will be working in a new environment.

News providers Business Wire and PR Newswire are promoting the use of XBRL to their members. Business Wire recently launched EarningDirect that helps corporate members convert their earnings releases into XBRL, which Business Wire then distributes to the media. PR Newswire is working with Reuters on a project to disseminate XBRL-tagged earnings releases. When public companies create their earnings releases in XBRL with a Microsoft application, PR Newswire distributes them to institutional investors and the media.

With many companies using press releases for their 8-K disclosures, these developments by wire services will promote clearer and faster disclosure and will increase the granularity of news reporting. With XBRL tags adding context to news releases, it will be easier for editors to identify trends, provide comparative analysis, and include small public companies and international companies in their news coverage. In addition, the announcement of corporate events can be more expeditiously pushed to targeted audiences like institutional investors, M&A professionals, and venture capital firms that receive time-sensitive information through RSS feeds.

Expectations for Librarians

In the near future, librarians can expect many new products from financial information providers. Product development will move away from storage of information and the building of document repositories to real-time interactive management of financial information contained in internal and external corporate reports. Instead of providing access to collections of static data, information providers will find themselves expected to facilitate access on a regular basis to fluid and changing financial information over its life cycle.

In much the same way, companies will want to provide increased access to financial information on their investor relations pages to attract and retain investors. Librarians can expect to see more tools on investor relations pages and in financial news portals. Tools that calculate company ratios, display industrial aggregates, or facilitate competitor analysis will join today's stock price graphing tools.

Publishers that take financial data, reformat it, and resell it will develop new business models. Since users, including librarians, will have free access to financial data and analysis tools, they will not be limited by determinations made by data providers about how to treat non-standard items or whether to include footnote information. Adoption of XBRL should stimulate the development of advanced business analysis tools by financial data providers who, in order to remain competitive, will need to exploit XBRL to develop new products or leverage existing ones.

Librarians should look at XBRL as a metadata system that is helping them use the Internet to create information. William D. Lutz, speaking at one of the SEC's Interactive Data Roundtables (Securities and Exchange Commission, June 12, 2006) advised information professionals to think of the Internet as "a medium—an interactive medium—and [one] that creates information." With widespread adoption of XBRL, information professionals could soon see a completely new financial reporting environment, one that is dynamic and interactive and that gives users the power to create the information they need through continuous interaction with XBRL data.

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Consortia Build Negotiating Strength

By Karen Eccles

Recently I negotiated, alone, an agreement for an electronic resource. It was intimidating.

I would not call it negotiation. It was my clear submission to the mercy of the publisher. I had no experience, no one to discuss it with, and no support group.

By the time I realized I was entering into unfamiliar grounds and the product was too expensive, it was too late. I had already requested an invoice, inquired about the availability of funds and somehow entered into an oral agreement with the publisher.

I tried to get out of it by saying maybe I would just go with the print resource. But the publisher made it clear that the figure on the invoice was the amount due. I was so shocked and so afraid of being sued or having the higher levels of my organization get involved that I caved in. Luckily, I had only licensed the product for one user and for one year. Later on, though, I found out another library in the same ministry was licensing the same resource; we could have collaborated.

Consortia

It is difficult for special libraries to form consortia or to join in any collaborative effort, simply because of their specialized nature and the different types of information they each provide. However, once common needs are established, consortia provide new opportunities for libraries.

Consortia are now emerging rapidly; and the ones that exist are becoming larger and larger, as individual libraries continually come together to join.

Consortia of libraries operate at the local, state, and regional levels. There also are different types: loose federation, the most common, governed by member libraries or by a sponsor with a group chaired by a member; multi-type/multi-state networks, which have separate governing bodies elected by their members; the tightly knit federation, which has a highly select membership; the centrally funded state-wide consortium, restricted to state colleges and universities within a state (Childs and Weston). However, the needs of a library also play a major role in determining membership.

Membership fees are required to join a consortium, but the "type of funding for each consortium depends on its own agenda, how it was created, and how it is managed" (Childs and Weston). The fewer the libraries involved, the higher the cost per library to participate.

Some networks of consortia are quite complex; however, a consortium generally works like this:

Member libraries come together and select a committee, a consortia committee, with representatives from each library. These are the more experienced staff or librarians who have already been involved in contract negotiation. However, less experienced

staff may also be on the committee to gain experience. Some consortia may even initially work with a contract lawyer.

The consortium may decide to deal directly with a given publisher or to go through a vendor. John Blosser argues that vendors act as intermediaries between libraries and publishers and work to standardize the format, language, definitions, and general conditions specified in licensing contracts. However, as consortia gain experience in negotiation, they can deal directly with the publisher and cut the cost of a middleman.

Many online resources provide principles, guidelines, and standards to follow in the negotiation of licenses such as "Principles for Licensing Electronic Resources," which the Special Library Association was instrumental in formulating (www.sla.org/content/SLA/advocacy/infobank/principles.cfm). The International Coalition of Library Consortia, also known as the Consortium of Consortia, also has published a "Statement of Current Perspective and Preferred Practices for the Selection and Purchase of Electronic Information" (updated October 2004, www.library.yale.edu/consortia/2004currentpractices.htm#1111).

Benefits of Consortia

Consortia take the burden of license negotiations off the shoulders of the individual librarian. Membership in a consortium gives individuals who are comfortable and experienced in the art of negotiation such responsibility. For them, the consortium offers a support structure for the review of license contracts and the clarification of difficult clauses in the contract. What one librarian may overlook, another may not.

According to Sheila Lacroix, the library coordinator at the Center for Addiction and Mental Health at the University of Toronto, one important role played by the Health Sciences Information Consortium of Toronto, is advocacy (personal communication, March 5, 2004). The consortium provides support for issues the library may need to take up with higher administration. An individual librarian may not be able to convince the directors within an organization of the need resources, but a larger body advocating for the needs of its member libraries provides an advantage for each library involved.

One significant role of consortia is to counteract what some see as an inverse relationship between electronic resources and licenses. In "Reference and the Licensing Agreement" (*Canadian Law Libraries, 2002*), Nancy McCormack says that "at the same time that electronic resources are opening a vast universe of information for researchers, they are shrinking that same universe for reference librarians and document delivery personnel as a result of the licensing agreements that accompany these products." Consortia not only play the role of intermediary in the negotiation of license contracts, but because of strength in numbers, they are able to widen the universe of resources for libraries—in effect, increase the quantity. It is more likely that a publisher will be more willing to adjust to the needs of a group of libraries rather than to one library.

There is also the advantage of increased access for more people from a consortium deal. Librarians argue that license agreements work counter intuitively to the role of libraries, which is access, and that the agreements attempt to limit access. McCormack phrases it nicely when she says, "The library profession has a prime directive: to make information available. Yet these licensing agreements require us, under certain circumstances, *not* to make information available." Even within the organization, "access may be purchased to an online source that provides a username and password for *one individual* only. The price increases if additional individuals obtain usernames and passwords," McCormack says.

However, membership in a consortium opens up access for more people, by decreasing the per-person costs for the use of electronic resources. The Canadian National Site Licensing Project has one agreement in which an "estimated 650,000 students, researchers and academic scientists in the Canadian consortium … have unlimited online access to full text, peer-reviewed articles" (CNSLP). Recently the Research and Information Center at the Ministry of Finance Toronto was able to take advantage of a license agreement that increased access from one individual to 131 people (Helen Katz, personal communication, March 6, 2004).

'What is remarkable is how well this model works for both publishers and libraries. Publishers increase their revenue while only giving up part of their market, which is probably never going to buy their product anyway.'

Many member libraries, may say that the greatest advantage of consortia membership—or even the reason for such membership—is the reduced prices for electronic products. A consortium buying electronic products is somewhat like bulk buying, and "costs reduction, more specifically the unit costs of providing core services is a primary benefit gained from consortial membership…Because of high material costs, especially for periodical subscriptions, libraries are interested in getting more bang for the buck out of their budgetary expenditures. Membership in a consortium allows a group of libraries to pool their financial resources to leverage greater control over their marketplace" (Childs and Weston).

However, even if a library is not able to benefit from low costs because they are not part of a particular license agreement, membership in a consortium also facilitates greater resource sharing and interlibrary lending among member libraries. In license agreements, publishers may want to restrict interlibrary loans, but IFLA's "Licensing Principles" advises, "Provisions for interlibrary loan or equivalent services should be included" in agreements. The consortium signs an agreement as one body, so sharing within this body should be allowed between consortium members.

The Health Sciences Information Consortium of Toronto has as part of its mandate cooperative resource sharing initiatives and collection rationalization, as well as free lending of books and journal articles among member libraries. "There can be no doubt that resource-sharing programs need special libraries, just as much as specials need those programs. Special libraries constitute between them an enormous research collection…Special libraries can bring to networking different perceptions about the information process by virtue of the cross section of the community they serve…Indeed it is the variety of participants that enable such resource sharing programs to flourish (Borchardt). Collaborative efforts among these libraries provide this opportunity.

Consortia positively influence the marketplace in the creation of electronic products. An example of the influence on electronic products is the Electronic Resources Subcommittee of the Toronto consortium. The committee evaluates resources' content, platform, interfaces, and so on, and voices collective user concerns to vendors on performance and quality standards. Therefore, the ability of consortia to influence the marketplace, not only because of their collective power, but also because of the feedback given to vendors, is an important role of consortia with respect to electronic products.

Another important role of consortia is facilitating professional development for librarians in member libraries. As part of its strategic goals, the Toronto consortium aims to facilitate effective librarian instruction of clients in the use of knowledge-based resources, as well as ongoing communication, professional development, and information exchange among all members. As part of its negotiation for electronic products, consortia negotiate for ongoing training—for example searching strategies for abstracts, full text, keywords, etc.

Advantage of Consortia To Publishers

Though it may appear that consortia operate to the disadvantage of publishers, there are advantages to be gained for publishers also. Kohl identified a number of these advantages. Significantly, with the rise of journal prices in the 1980s and 1990s, consortia were able to stop the large-scale cancellation of journal subscriptions when individual libraries were not able to afford the increased costs. For a larger body, increased costs of electronic resources are not as burdensome. Subsequently, publishers are now able to experience revenue increase and establish predictability and stability in their markets. There is also the increased visibility of their journals through wider distribution.

Kohl, discussing the OhioLINK consortia model says, "What is remarkable is how well this model works for both publishers and libraries. Publishers increase their revenue while only giving up part of their market, which is probably never going to buy their product anyway … Further, the costs of providing access to many copies of electronic versions of the journals also does not increase for the publisher in any significant way after the first electronic copy."

Given the strength of consortia, publishers must respond to the needs of libraries. Consortia should take a big chunk of credit for the clear and positive collaborative effort between publishers and libraries.

Problems

However, before you start making phone calls and searching the Internet for a consortium you can join, you should also know there might be some hitches. Baker discussed a number of problems, such as limited staff resources, different pricing models, and the overwhelming number of "special offers" that bombard consortia staff. There is also the problem of overlapping consortia, the dilemma of participation in too many cooperative activities, and the fact that a library's selection of one consortium deal might negatively affect colleagues who are in another consortium (Machovec, 2000). According to Olivia Madison, "challenges facing consortia center on increased competition, severely strained budgets of their members, limited consortia budgets, and the need for staff and member-based leadership to effectively carry on consortial business" (Snyder, 2004, p. 6).

Many special libraries simply do not join consortia because of the fees for membership. Another issue raised by Katz is the time-consuming work involved in starting a consortium—or even being a member of one.

Lacroix also mentioned of the time and "extra work" involved as a result of membership, especially for the library whose staff has responsibility for an issue on behalf of other member libraries. She also pointed out the bulk packages that her library sometimes gets from a license deal may be of little or no use to her library because of specialized needs. "You get what you sometimes don't need or want"

Many special libraries simply do not join consortia because of the fees for membership. Another issue is the time-consuming work involved in starting a consortium—or even being a member of one.

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(personal communication March 6, 2004).

The advantage of special libraries—their unique collections—seems to be a disadvantage when it comes to joining consortia. Says JoAnn McQuillan, director of information and communications at the Institute of Communications and Advertising, "I am too small and isolated to get involved in any group buying/licensing. Very few solos would be involved in this" (personal communication, March 5, 2004).

Another problem could be internal conflicts among members that may fragment consortia and result in prolonged decision-making. In consortia of special libraries, what is the ideal resource when each library has its unique special collection? Who decides? Whose interest should come first? Larger libraries may have a louder voice in determining what is the ideal electronic resource to purchase.

Conclusion

However, many of these problems can be overcome if libraries that come together share the same needs and have the same objectives. Also, many of the electronic resources have multiple databases with multiple subject areas that all the libraries in the consortium can use. Moreover, membership in consortia provides an umbrella of protection and benefits for individual libraries.

Look around, there must be a few libraries nearby willing to collaborate, or maybe the consortia that is right for you already exists.

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coming events

December 2006

New Librarians' Symposium 2006
Australian Library and Information Association (ALIA)
1-2 December 2006
Sydney, Australia
http://conferences.alia.org.au/ newlibrarian2006/

Eighth International Conference on Grey Literature
4-5 December 2006
New Orleans, LA, USA
http://www.textrelease.com/pages/2/index.htm

International Conference on Digital Libraries (ICDL 2006)
The Energy and Resources Institute
5-8 December 2006
New Delhi, India
http://static.teriin.org/events/icdl/

50th Anniversary - Golden Relection & Directions
Military Librarians Workshop
Dec 4-8, 2006
http://www.sla.org/division/dmil/index.html

CLICK U Live!
Copyright for the Corporate Librarian: The Importance & Consequences of Copyright Issues in the Digital Environment
6 December 2006
www.sla.org/clickulive

1st International Conference on Digital Information Management
Digital Information Research Foundation and Christ College
6-8 December 2006
Bangalore, India
http://www.icdim.org

CLICK U Live!
Taxonomy Technologies and Successes: Techniques & Systems for Automated Classification
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Weighing the Four Fair Use Factors

By Lesley Ellen Harris

In the U.S., fair use is a judicially created defense originating in the mid-19th century. It was first codified in the U.S. *Copyright Act of 1976*. The current fair use provision is as follows:

§ 107. Limitations on Exclusive Rights: Fair Use

Notwithstanding the provisions of sections 106 and 106A, the fair use of a copyrighted work, including such use by reproduction in copies or phonorecords or by any other means specified by that section, for purposes such as criticism, comment, news reporting, teaching (including multiple copies for classroom use), scholarship, or research, is not an infringement of copyright. In determining whether the use made of a work in any particular case is a fair use the factors to be considered shall include—

(1) the purpose and character of the use, including whether such use is of a commercial nature or is for nonprofit educational purposes;

(2) the nature of the copyrighted work;

(3) the amount and substantiality of the portion used in relation to the copyrighted work as a whole; and

(4) the effect of the use upon the potential market for or value of the copyrighted work.

The fact that a work is unpublished shall not itself bar a finding of fair use if such finding is made upon consideration of all the above factors.

How Fair Use Works

Fair use is not defined but is left open for a court to decide whether a particular use might be subject to this defense on a case-by-case basis, taking into account certain factors as enumerated in the provision. This intended flexibility is the cause of much confusion, and its interpretation of much debate. It is clearly the intention of the U.S. Congress to leave fair use open to interpretation and new technology based upon a court's consideration of any particular case before it.

In determining whether any one situation of copying is fair use, a court must consider all the above four criteria. However, the Copyright Act does not further define these factors, which are intentionally vague, and it does not provide guidance as to the weight to be given to any one factor or whether the factors must be equally weighed in a court's determination.

There is much discussion as to the weighing of these four factors and whether they should be given equal weight in a court making its determination. A 1985 U.S. Supreme Court case, *Harper & Row v. Nation Enterprises*[1], fuels the argument that the fourth factor is the dominant one by stating the following:

Finally, the Act focuses on "the effect of the use upon the potential market for or value of the copyrighted work." This last factor is undoubtedly the single most important element of fair use.

Why, then, would the Copyright Act set out four factors, if it ultimately came down to one factor? In the 1994 Supreme Court decision in *Campbell, aka Skyywalker et al. v. Acuff Rose Music, Inc.*[2] the Supreme Court stated (albeit in a footnote to its decision) regarding the fourth factor, the following:

This factor, no less than the other three, may be addressed only through a "sensitive balancing of interests." … Market harm is a matter of degree, and the importance of this factor will vary, not only with the amount of harm, but also with the relative strength of the showing on the other factors.

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In 1995, a Second Circuit court in *American Geophysical Union v. Texaco Inc.*[3] followed *Campbell*, stating that that court abandoned "the idea that any factor enjoys primacy."

Because of these cases, judges must equally weigh all of the fair use factors. However, with four factors, there is a chance that a judge will find two factors in favor of fair use and two factors against fair use. In such a situation, how would the judge make his final determination?

The fact that the Copyright Act provides judges with no guidance on weighing the four factors has led one author to opine that, "Courts must therefore proceed by the seat of their pants." Copyright expert David Nimmer suggests that judges first determine whether the use is fair use or not, then use the four factors to justify their decision. In other words, "the four factors fail to drive the analysis, but rather serve as convenient pegs on which to hang antecedent conclusions." Alternatively, he argues that a judge begins to apply the facts at hand to each of the four factors and, during this process, reaches his conclusion, which ultimately determines the analysis to the remaining factors to be considered. (Nimmer's discussion of these issues is at Nimmer, David, "'Fairest of Them All' and Other Fair Tales of Fair Use," *Law & Contemp. Probs*. 263 (Winter/Spring 2003).)

[1] 471 U.S. 539 (1985).

[2] 510 U.S. 569 (1994).

[3] 60 F.3d 913 (2nd Cir. 1995).

Growing Your Own Search Engine

By Stephen Abram

A few new and exciting custom search engines have come out lately, and they have some applicability to the information professional's daily work.

Here's the short list:

Google Co-op (beta) Custom Search Engine—www.google.com/coop/cse/overview

Rollyo (beta) Roll Your Own Search Engine—www.rollyo.com

Yahoo! Search Builder—http://builder.search.yahoo.com/m/promo

PSS: Personal Search Syndication—www.pssdir.com

Eurekster's Swickis—www.eurekster.com

OK, now you learners who just want to go play and see what they do, go play. It's a fast way to learn. For the rest of us who need to read a bit first, read this quick overview. Then go play. For some of us, it's like washing our hands before we eat, brushing our teeth before we leave the house, or stretching our arms before we keyboard. Reading first is a necessary habit for many of us.

Arriving at desktops near you is the next step in search: personalized searches that go beyond just simple alerts but let you tune your search by topic, domain, and presentation style—or down to specific root URL's.

During a workday, many of you may find yourselves searching, repeatedly, small groups of Web sites on a regular basis. It is particularly common to check competitors' sites, special sites (like retail pricing sites), or country, military, and government domains. Sometimes you have used Web watch services to track changes, and sometimes you just search normally hoping to pick up new information. Frustratingly, you might be using URL searches in Google in the old-fashioned reiterative mode. Rarely, but it still happens, information professionals will visit a list of important sites daily to check them out. All of this is a Hoover™-level personal productivity drain even though it can deliver high value information and intelligence.

Now, a load new search services are providing the ability to create your own search engine, and search the way you want on a small scale. Many are in beta but still useful and lie on top of standard Web harvests like Google and Yahoo! There are ways with the right budget and ROI to create specialized search engines on any scale, such as the FAST service from SirsiDynix in Rooms.

However, many of our smaller research needs can be addressed by these mini-custom search tools. Besides, it's worthwhile to experiment with these, since it will make us a better evaluator and purchaser of enterprise-wide, value-added search environments and tools.

Google Co-op

Google Co-op is a platform that enables you to customize the Web search experience for both Google and your own Web site. It's a simple development tool that can be applied to your internal or external work environment. You can create your own search engine and use the ubiquitous Google search technology to create a free engine that reflects your needs. As an aside, but an important consideration, you need to assess how comfortable you might be in earning advertising revenue from the resulting traffic (and serving up your organization's search traffic to another entity).

With Google Co-op, you can deliver specialized search results by encouraging users to integrate your information or services into their Google search results. You will also help users refine their searches and use your expertise as an information professional to help improve Google Web search for specific subjects by labeling the best sites.

One recent example of a Google Co-op application is LISZEN, (www.liszen.com), which has created a single search engine to search more than 500 library- and information-science-specific blogs. It's a useful, targeted search aimed at a specific market of librarians. I have written in the past about the need for a search engine for library Web sites by type of library and subject. For instance, why is it so difficult to search for public library Web sites aimed at teens or academic library sites that offer e-reserves, virtual reference, or e-books? How about associations or charities? Google Co-op offers the opportunity to create a tuned search engine like this. The holes in the Swiss cheese could be filled collaboratively.

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I can easily imagine applications where you search all of your competition using this tool. Also, pick a topic, any topic, and your bookmark file of Web sites on that topic area and create a search engine that searches them all at once. You could even make a useful public presence by creating a specialized search page for every good site you know about Alzheimer's, MS, MLK, or nanotechnology. Your limitations are your own imagination, time, and energy.

Rollyo

Rollyo is free. (Its tagline shows this is a true child of the 70s - Roll Your Own search engine.) The limits are that you have to register and you can only select up to 25 Web sites to search. You can choose any set you want so it could be personal hobbies or music sites—or professional, subject, or topical sites. I find that I learn things better when there's a personal interest, so I pick that as my test. I can then transfer my learning to work. Besides, sometimes I know more about my personal interests and can then evaluate the tool better. Rollyo is built on top of the Yahoo! Web harvest and uses its defaults. Rollyo calls these custom search engines "searchrolls." You can share your searchroll with anyone, keep it to yourself, or paste it into your Web site, blog, or intranet. There are even ways to add the searchroll to your Firefox browser as a bookmarklet or search bar button.

Rollyo is just simple and easy to use. It's free so there's no real downside other than you will learn something about creating simple federated search.

PSS! (Personal Search Syndication)

PSS, or Personal Search Syndication, is pretty new. With the cool tip of the hat to RSS, it has a winning name. Like Rollyo, it's free. The differentiator here is that you can set up custom searches rather than just offer a search box on top of a collection of sites. You are limited to 24 search terms and Boolean "and" operators. You cannot use phrases or any of the more complex Boolean stuff in your kitbag. This isn't fatal, but you might have to be creative and suffer a few more false drops. Since it follows the syndication model, you can't expect on-demand results. It updates daily, and daily alerts can be sent via e-mail.

I can envision that PSS has the potential to work for you in areas where you have an unambiguous search (like a distinctive trademark) for Web site information and need regular info. However, I still find Technorati better for the blogosphere. PSS shows promise, though.

Yahoo Search Builder

This is another one of the new personalized search tools. It works like the others. You choose five Web sites and then some keywords. This builder also lets you build an unlimited news feed and filter by types of news like sports, politics, or entertainment. The Yahoo! product also lets you have some control over the display, such as text size, width, color, and font. You can choose your own banner.

Yahoo! Search Builder says on its site that it can bring the power of Yahoo! search to your site by easily adding Web search and site search, tailoring the look and feel of the search experience to match your site and enhancing the search engine algorithm to focus on your site's topic. It does this and it does it well.

Eurekster Swickis

Eurekster's swicki has been around for a while. Some think that heralds the future of search as the Web harvest gets too big, too unmanageable, and too disparate. The idea of community-based search and relevance is not new but it's taking a while to emerge (as with all complex ideas). With a swicki, you tap into the wisdom of crowds using social networking tools. You also can build a search environment that is informed by the team that collaborates or shares an interest in the quality of the results.

This seems like a good place to look for search that is oriented to work teams, R&D groups, and special projects. The behavior of the searchers drives improvements to the swicki. The tag cloud on every swicki allows you to view the ongoing search preferences of the users and use those insights to improve the content. It is more complicated to understand than standard search, but it shows promise for user-centric and team-centric search that gives a more targeted and expert-driven service. It's worth keeping an eye on.

Conclusion

If you read this column regularly, you already know that I value play as a key learning option for us to adapt our skills and competencies for the emerging world. As we arrive at the tipping point where human factors trump technology, we must set up information professionals as guides and experts to success in this new world. We can go a long way to positioning ourselves as information-fluent and technology-adept professionals by playing with and learning about the new tools as they emerge. The ones outlined in this column are a fun place to start. Specialized search tools created to meet the needs of identified communities and special niche users could be a goldmine for you and your organization. And you will be better prepared to deal with the world of advanced federated search when your organization matures beyond simple search boxes in the middle of a white field.

O is for Optimism

By John R. Latham

In a recent blog post, Jill Hurst-Wahl summarized some interesting points raised by Dame Anita Roddick, the founder of the Body Shop. Apparently, Dame Anita referred to entrepreneurs as being pathological optimists, and survivalists.[1]

Optimists and survivors are exactly what we, as the new information managers, should be and be seen to be. We can all find roadblocks and obstacles to discourage us from change. If we approach them with optimism, they won't go away, but they will be surmountable. I am sure that Body Shop's founder, as an inexperienced woman in business, had to overcome many. My recent experiences within the SLA community and information profession in general indicate that there is a great deal more optimism about the future of the profession now than a few years ago. How can we put this optimism to good effect?

Be a change agent. Nothing shows your optimism for the future more than being a change agent. This does not mean changing things for change's sake. But even if you need to keep the basic product or service the same, take time to review its presentation in case you could beef up its format to look new and vibrant. If you have an information center intranet, you may need to keep the basic format the same to maintain your brand, but within this, there are ways to present the content in new and exciting ways. As so much information is sent around electronically to people's desktops nowadays, there is constant competition to have your content read.

Experiment with new technologies. Blogs, wikis, and RSS feeds hardly seem new anymore, but that does not mean that we have created them for our departments yet, or are putting them to the best advantage. If you are going to launch a library blog, for example, make sure you do your homework first to ensure that it is not only meeting a user need, but also that the need is immediately apparent to the users. Training may be required, so arrange for it to be done immediately before or after the launch, and then schedule further training on a one-to-one basis after the service has been introduced. Often, users think that they understand how to use a service, but do not gain the maximum advantage because they are not using all the functionality available. They are more likely to dismiss it as of minimal value than ask for assistance. Your enthusiasm and optimism for any new product or service will not be caught by your users if they do not see what's in it for them right from the start.

Maintain a lightness of touch. Although you must maintain relevance in your products or services, don't forget to include exciting announcements or add news about what is being done by information professionals, not just information about your specific industry or profession. Use the "Wow!" factor by getting your stakeholders to say, "Wow, I did not know that you guys were into all this exciting and cutting edge stuff. Can you do that for us?" Senior management, particularly, need to be reminded of the extent of our competencies. I have found that blogs are a source of an amazing amount of information about what our professional colleagues are doing. The diversity of the things in which they are involved can only fill one with optimism. SLA's News Connections at http://www.sla.org/newsconnections, and the new SLA Feed Reader are great resources to keep abreast of current industry news.

Don't be afraid to fail. Optimists and survivors are not afraid to fail. Rarely can one be successful without making mistakes, and, of course, learning from them. I was reading a blog recently about the fact that management and IT departments are so often totally against instituting instant messaging (IM) as a library reference tool. They have preconceived ideas that IM is just for kids, and that IM is going to destroy our computers.[2] Although I have not used it in a reference situation, I can see that IM might be a great way for users to get their reference questions answered in a way with which they are comfortable. We must not just offer one way of responding to our users needs, but offer whatever formats they require.

Be globally local. Dame Anita also commented that the Body Shop is a multi-local company, in that, although it operates globally, in each location it thinks and acts locally. This should be borne in mind when one is setting up global information services or even services nationally.[3] It is also much easier to promote your infectious optimism locally than globally. Go for O.

[1] "Insight CNY: Dame Anita Roddick." Jill Hurst-Wahl. October 27, 2006. http://womenentrepreneurs.blogspot.com/2006/10/insight-cny-dame-anita-roddick.html

[2] IM talking points. http://walkingpaper.org/358/

[3] "Insight CNY: Dame Anita Roddick." Jill Hurst-Wahl. October 27, 2006. http://womenentrepreneurs.blogspot.com/2006/10/insight-cny-dame-anita-roddick.html

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