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Measuring for Success

Wow! SLA 2012 is now one for the record books, and what an outstanding conference it was! Special thanks go to Cindy Hill and her team on the Conference Advisory Council for leading the planning process, to the division planners who put together 250-plus continuing education sessions and networking events designed to support the professional development needs of SLA members, and to the many other volunteers who helped SLA fulfill its mission to strengthen its members through learning and networking initiatives. Bravo! Bravo!

This issue of Information Outlook focuses on metrics, so I’ll begin by providing some metrics of success for SLA 2012. There were almost 3,500 attendees in Chicago, and the number of those who paid to attend the full conference was up 20 percent over SLA 2011 in Philadelphia. This is a significant indicator that SLA members continue to find value in conference content and, furthermore, that more members are economically able to attend. More than 200 companies showcased their latest offerings at the INFO-EXPO, the premier exhibition of information management products and services.

SLA’s success, however, is not measured solely by its annual conference. As Gary Labranche of the Association for Corporate Growth pointed out during the leadership orientation session in Chicago, professional associations like SLA provide more educational opportunities than all colleges and universities combined. But with SLA chapters dispersed around the globe, it is difficult to know what learning and networking initiatives are taking place throughout our association without monitoring more than 150 unit Websites, discussion lists, blogs, and social media sites.

To facilitate sharing of this information, an association-wide calendar is being made available that will make it easier for both members and non-members to see what opportunities are available on a given day in any part of SLA’s global organization. This project builds on the efforts of Operation Vitality (led by former board member Daniel Lee), which has brought a unified technology platform to our units over the last two years. One of your board’s strategic goals for 2012-2014 is to foster 24/7/365 continuing education opportunities. This new calendar will showcase what your association is doing for members and will be a visible indicator of whether the board is fulfilling this strategic goal.

Measuring one’s performance is instrumental in demonstrating success, both personally and professionally. SLA has two core values that relate to measuring success: to add qualitative and quantitative value and to deliver measurable results.

Another of the board’s strategic agenda items is to grow SLA by diversifying our membership. But in order to know whether this objective is being achieved, we must know who our members are. What industries do we represent? What work environments do we represent, and how long have we been working in these professions? What educational backgrounds are represented among our members? To what other organizations do we belong?

If we know the answers to these questions, SLA leaders can make better decisions about what our members need to support their professional development. A presidential task force led by Kimberly Silk is developing a list of questions that will be used to gather the information needed to support this type of decision making. The answers to these questions can be used as a benchmark with which to measure our success at diversifying our membership.

Establishing Standards

In many professions, there are mandates to engage in lifelong learning and professional development. These mandates are often linked to licensure of some kind, requiring participation in designated learning activities to maintain credibility as a professional.
This type of a professional development regime is rooted in the traditional concept of a professional as autonomous and self-regulating, with specialized expertise and a responsibility to the public to maintain particular standards in this expertise.

SLA is not, at this time, a certification-issuing professional association. We do, however, offer certificates that demonstrate proficiency in a handful of subject areas, notably copyright and knowledge management. We also provide, for those members who find them professionally useful, certificates of completion for continuing education courses sponsored by SLA.

But the diversity of our membership makes it difficult to establish a uniform set of standards against which information professionals can measure themselves. The SLA Competencies, while they are not exactly metrics with which we can compare one member to another, are used by many members to define job parameters and set goals for performance evaluations. Under the leadership of past president Anne Caputo, a task force is updating the SLA Competencies and expects to complete its final report by the end of the year.

Measuring one’s performance is instrumental in demonstrating success, both personally and professionally. SLA has two core values that relate to measuring success. One is to add qualitative and quantitative value to information services and products; the other is to deliver measurable results in the information economy and in our organizations.

This issue of Information Outlook features three articles by expert authors on the subject of measuring for success. Constance Ard discusses using metrics to communicate value; Martha Haswell outlines how to use benchmarking to improve performance; and Steve Hiller dovetails information service metrics with the goals of the overall organization. Their collective wisdom will give you a broader understanding of the framework by which you can measure your professional success. Enjoy! SLA
Nominations Sought for Board Positions

Looking for a way to take your leadership skills to the next level? Know someone who has the skills, desire and drive to help SLA members prepare for the future? If so, the SLA Nominating Committee invites you to nominate yourself or recommend a colleague to serve in one of the following leadership positions:

- President-elect;
- Chapter cabinet chair-elect;
- Division cabinet chair-elect; or
- Director (two positions).

The committee is seeking 10 candidates—two for each of the five positions—to stand for election in September 2013 and begin serving in January 2014. Candidates should be good listeners and speakers, forward thinkers (able to see the big picture and guide the association in the proper direction), knowledgeable about SLA and its governance practices, solution oriented, and committed to following through on projects and assignments. Information about each position can be found on SLA’s Website at www.sla.org/content/SLA/governance/bodsection_descriptions.cfm.

Board members are expected to participate in monthly conference calls and meet in person at the SLA Annual Conference and the Leadership Summit. Travel reimbursement is available for board members if needed; see the SLA Travel and Expense Policy at www.sla.org/content/SLA/governance/Policies/01-92.cfm.

All SLA members, especially leaders of divisions, chapters, committees, and councils, are encouraged to identify people they think are ready and willing to serve as members of the association’s board. Service on the board provides an opportunity to expand your management and leadership abilities, and the skills learned can easily be applied to your job and career.

Nominations must be received by 11 January 2013. To nominate an SLA member for the board, forward the following information to any member of the Nominating Committee:

- The nominee’s name, address and phone number;
- The board position for which you are recommending the nominee;
- The length of time the nominee has been an SLA member;
- Offices the nominee has held in SLA chapters, divisions, committees, or councils;
- The association-level committees on which the nominee has served;
- Other SLA and professional activities (e.g., teaching continuing education courses or writing articles for publication) in which the nominee has participated; and
- Any additional information that distinguishes the candidate from others and illustrates why he or she is an ideal candidate for the board.

Nominations can be sent to any member of the Nominating Committee (see below). Contact information for committee members is available at www.sla.org/content/community/committee/nom.cfm.

- Donna Scheeder, chair;
- James Manasco, chair-elect;
- Amy Buckland;
- Lorene Kennard;
- Karen Reczek; or
- Linda Broussard, SLA staff member.

Annual Conference Draws 3,500 to Chicago

Nearly 3,500 information professionals and representatives of information services vendors gathered in Chicago in mid-July to learn, network and share ideas and experiences at SLA’s 2012 Annual Conference & INFO-EXPO.

The titles of some of the 200-plus conference sessions reflected the varied roles that information professionals increasingly are assuming, with presentations such as “Transitioning into Management and Leadership,” “Reinventing Library Skills,” “Contract Negotiation” and “The Librarian as Entrepreneur” drawing large and eager audiences. The keynote speaker, Guy Kawasaki, also proved popular with attendees, hundreds of whom listened to him share lessons from his latest book, Enchantment: The Art of Changing Hearts, Minds, and Actions.

SLA’s INFO-EXPO, the premier exhibition of information management products and services, featured 207 companies showcasing their latest offerings.

The opening evening of the conference included a special awards ceremony that honored the following individuals:
• John Cotton Dana Award: Jesus Lau
• SLA Hall of Fame: Sharon Lenius and Susan Fifer Canby
• Dow Jones Leadership Award: Christine (Kee) Malesky
• ProQuest & Dialog Member Achievement Award: Daniel Lee
• Rose L. Vormelker Award: Bruce Rosenstein and Denise Callihan
• 2012 SLA Fellows: Scott Brown, Ann Cullen, Ruth Kneale, Chris Olson, and Roberto Sarmiento
• 2012 SLA Rising Stars: Davis Erin Anderson, Janel Kinlaw, Moy McIntosh, and Chris Zammarelli

Dow Jones and Springer supported the conference as platinum-level sponsors. The following industry partners also sponsored events, products or services.

• Copyright Clearance Center
• Elsevier
• IHS
• J.J. Keller & Associates
• LexisNexis
• NewsEdge
• ProQuest & Dialog
• SLA Illinois Chapter
• SLA Philadelphia Chapter
• TRAK Records & Library
• Wolters Kluwer | Ovid
• Wolters Kluwer | Law & Business
• Taylor & Francis Group
• Wiley-Blackwell
• Recommind SLA

Jesus Lau

Sharon Lenius

Scott Brown (left), Ann Cullen, Ruth Kneale, Chris Olson, and Roberto Sarmiento

Chris Zammarelli (left), Moy McIntosh, Erin Anderson, and Janel Kinlaw

Susan Fifer Canby
Teaching, Communicating are Key to Proving Value

Information professionals need to become partners in the teaching and research process and raise awareness of their services at all levels of the organization, according to a project designed to identify ways for academic libraries to demonstrate their value. The project, based on case studies of eight university libraries in three countries, found that academic librarians typically receive positive feedback about their services but sense that faculty and staff do not take advantage of all the resources the library has to offer. It also found that librarians are struggling to find systematic ways to capture and communicate evidence of their value (rather than their activity) to the academic community and especially students.

The case studies showed that embedded information literacy instruction is highly valued by faculty—who can see first-hand how it improves the quality of the assignments they receive from students—and that such instruction increasingly is being integrated into teaching and curriculum development activities. They also provided evidence of successful partnerships between librarians and research staff in the areas of literature reviewing and data curation.

Communicating the availability and value of these and other library services was also identified as critical to success. Meeting with individual research staff and targeting services to address specific needs was seen as an effective, although time-intensive, method for librarians to raise their profile and value. Ideally, such engagement should be multidimensional—that is, it should take place at all levels of the institution, not just between librarians and departmental liaison staff.

The project, “Working Together: Evolving Value for Academic Libraries,” was commissioned by Sage and undertaken by LISU, a research and information center based in the Department of Information Science at Loughborough University in Leicestershire, England. The project’s findings led to the development of several recommendations, as follows:

**For individual librarians**
- Promote the relevance of librarianship skills to the digital information environment
- Reach out to users by improving communication, building personal relationships, using appropriate language, and following through to build on success
- Go beyond the comfort zone—for example, develop skills in teaching and marketing

**For library managers**
- Support and promote staff development by providing appropriate training opportunities
- Collect evidence of the value of library services—qualitative as well as quantitative—and use it systematically with the full range of stakeholders in the service
- Document the processes and effective strategies for building partnerships with teaching and research staff, so that these can be replicated easily

**For institutions**
- Recognize the library contribution by engaging with the library at all levels, not just liaison librarians with teaching and research staff, but also at senior management level
- Uphold the status of librarians and information professionals on an equivalent level with teaching and research staff

**Cost, Technology Spurring Rise in Group Research**

A growing number of research papers are being written by multiple authors, sometimes 3,000 or more, and this trend is likely to continue in the fields of physics, space science and engineering, according to analysts at Thomson Reuters.

A recent article in *ScienceWatch*, published by the Intellectual Property & Science business of Thomson Reuters, noted that scientific research typically has been conducted by individuals or small groups of researchers, most of whom work for the same company. Beginning in 2008, however, large research projects comprising hundreds and even thousands of scientists became more common, with a commensurate rise in the number of papers with multiple authors.

The article, “Multi-author Papers: Onward and Upward,” credited the Large Hadron Collider (LHC), the particle accelerator located on the French-Swiss border, with the increase in multi-author papers. Scientists from around the world are conducting research at the LHC, which is being used by physicists to study small particles that serve as the building blocks of all things.

The LHC exemplifies three factors that are driving the rise in multi-author papers: the high cost of science, demands for faster innovation, and the speed of technology. These three factors have combined to produce a phenomenon known as “big science,” which is characterized by several international organizations partnering to share complex, expensive technology at large installations. This approach to research lowers costs and leverages the value of collaboration, but it calls into question the nature of “authorship.”

*ScienceWatch* is an open Web resource for science metrics and research performance analysis. To read “Multi-author Papers: Onward and Upward,” visit sciencewatch.com/.

**Major U.S. News Sites Losing Credibility**

National newspapers, cable news outlets, broadcast television networks, and NPR have all seen their believability ratings decline by double digits over
the past decade, with only local newspapers and local TV news bucking the trend, according to a recent survey.

The Pew Research Center for the People & the Press polled roughly 1,000 U.S. adults in mid-July and asked them to rate the credibility of individual news organizations using a 4-point scale. A rating of 4 means a person believes “all or most” of what a news organization says, while a rating of 1 means a person believes “almost nothing” of what the organization says.

Across all 13 news organizations included in the survey, the average positive believability rating (3 or 4 on a 4-point scale) was 56 percent, down from 71 percent a decade ago. Local TV news and the CBS News program “60 Minutes” rated most highly—as they have in past Pew surveys—with nearly two-thirds of respondents assigning them scores of 3 or 4. At the bottom of the scale are MSNBC, the New York Times, Fox News and USA Today, which are considered credible by half or fewer news consumers.

The decline in believability has been accompanied by a growing partisan divide, with Republicans exhibiting a rising distrust of the news media in general and broadcast and cable TV news organizations in particular. Of the 13 news organizations included in the survey, just two—Fox News and local TV news—garnered positive credibility ratings from respondents who identified themselves as Republicans; in 2002, only two news organizations did not receive positive ratings from at least two-thirds of Republicans. A decade ago, the “credibility gap” between Republicans and Democrats who rated cable TV networks positively was only about 10 points, but since then, the gap has grown to more than 30 points.

For more information about the survey, visit www.people-press.org/.

**Graduates Want Continued Access to Research**

Two organizations representing students in graduate and professional programs have announced they are supporting a larger effort to ensure that their members have access to research findings resulting from projects funded by grants from U.S. Government agencies.

In a recent editorial in The Washington Post, Matt Cooper, president and CEO of the National Association of Graduate-Professional Students, and Elizabeth Wiley, president of the American Medical Student Association, called on President Obama to issue an Executive Order requiring journal articles arising from federal non-defense research grants to be made publicly available within six months.

“At graduations across the country, students are walking across the stage, receiving their diplomas and beginning the next chapter of their lives,” the two wrote. “These graduates are equipped with a wealth of new tools. However, nearly all are forced to leave behind one of the most important: their library card.”

Cooper and Wiley cited PubMed Central (PMC) at the National Institutes of Health (NIH) as a model for their ambitions. PMC is a free, full-text archive of biomedical and life sciences journal literature at NIH’s National Library of Medicine. Nearly 2.5 million articles are archived in PMC, including every article from more than 1,000 journals that have agreed to deposit the complete contents of each issue into the repository. Roughly a half-million people use PubMed each day, downloading more than 1 million papers.

Cooper and Wiley said their organizations are joining with the Wikimedia Foundation, Creative Commons, and other groups and individuals to back “We, the People,” a White House-sponsored petition to require free Internet access to scientific journal articles arising from taxpayer-funded research. More than 30,000 people have signed the petition, enough to require the White House to issue a formal response. SLA
What if you measured the performance of your library or information center, and nobody in senior management paid any attention to your results?

A few years ago, two students at Harvard Business School interviewed several people who donate significant sums of money—collectively, about $50 million per year—to charity. These donors all worked in the finance and investment fields and thus were familiar with, and advocates of, performance measurement. The students reasoned that because their subjects were passionate about gathering data and using it to make objective business decisions, they would welcome such information about the charities they supported.

To their surprise, fewer than 20 percent of the donors expressed interest in receiving better data about nonprofits. The others were skeptical of its value or even opposed to measuring charities’ performance. Typical of such reactions was this one, from a managing director at Morgan Stanley: “Once I’ve gotten beyond an assurance of efficiency—that the organization is not running a deficit—and as long as the staff can articulate that they are meeting their goal, I don’t apply the same rigor.”

Puzzled by their findings, the students began interviewing institutional funders, nonprofit executives, and industry analysts to gain more insight. They concluded that the objections to receiving performance information demonstrate that measurements, in and of themselves, are of limited impact. “Performance measurement proponents need to go beyond the theoretical value of measurement,” they wrote. “They need to change fundamentally the way people think about and give to nonprofits” (Cunningham and Ricks 2004).

Supporting the Overall Mission

This message applies as well to information professionals, who must change the way their organizations’ leaders think about libraries. That mandate infuses this issue’s three theme articles, which focus on the need for libraries to show how they support the overall mission of their parent organizations.

In “What Are We Measuring, and Does It Matter?” Steve Hiller recounts the history of library metrics and particularly their evolution from “counts” of volumes, budgets and users to measures of value and outcomes. He discusses the impact of this evolution on both corporate and academic libraries, noting that the former typically are better integrated into the planning infrastructure of their parent organizations and more likely to be able to demonstrate their contributions to organizational success. He concludes his article by stating that librarians should recruit organizational management and the user community to help develop value metrics so that all three groups better understand and recognize the difference the library makes.

“Do value metrics matter?” he asks. “Yes, they do. Value metrics not only measure what is critical for organizational success, they also show those outside the library our vision for services and our commitment to change.”

Many information professionals, however, find they must put metrics to more basic uses, namely defending their staffing and funding levels. Martha Haswell, in “Benchmarking: A Powerful Management Tool,” explains that metrics developed for these reactive purposes can also be used proactively and strategically to help position libraries as value centers within organizations. Specifically, she notes that two of the most common questions her firm answers when performing benchmark studies for corporate libraries are “What are the best ways to demonstrate library quality to senior management?” and “Where can we improve effectiveness or improve efficiency?”

Benchmarking studies conducted by Haswell’s firm have found that the percentage of potential library users who are actual users has increased over the years, from 17.5 percent in 2003 to 37 percent in 2011. This metric helps demonstrate the value of libraries and information centers and positions them as need-to-have resources rather than nice-to-have services.

The goal of positioning the library can be furthered by using qualitative as well as quantitative analyses, as Constance Ard argues in “Beyond Metrics: The Value of the Information Center.” What Ard calls “the nuances of information
"services" make it difficult to take a one-size-fits-all approach to using metrics to demonstrate value, so she recommends using a framework defined by six simple questions: who, what, where, when, why and how.

Answering these questions, however, is only part of the process—information professionals must also package and communicate the results. “While the CFO may want to see just numbers, graphs and charts, a CEO will want to tell a story that demonstrates the positive impact of information services on the bottom line,” she writes. “Qualitative value is much easier to share in a story than quantitative value, so reporting methods that combine the two may be the ideal solution.”

In addition to the theme articles, Debbie Schachter’s “Info Business” column also addresses metrics and value. Schachter posits that research in areas such as human resources can lead to strategies and tactics that librarians can use to help measure and communicate their value.

“Can you evaluate and communicate the value of your service in a similar manner as other departments in your organization?” she asks. “Will this help senior management understand what you are contributing to the bottom line?”

The key lesson for information professionals may be that the purpose of using metrics is to demonstrate that the library makes a difference. As the two Harvard students noted in their study analysis, “In order to be interested in measurement, donors would need to believe that there is a substantive difference among organizations. In other words, it is important to track performance if and only if you expect to find that one organization is better than another.”

Can you afford not to show that your library or information center is better—and, even more important, that it delivers value?

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“Few libraries exist in a vacuum, accountable only to themselves. There is always a larger context for assessing library quality, that is, what and how well does the library contribute to achieving the overall goals of the parent constituencies.” (Sarah Pritchard, “Determining Quality in Academic Libraries,” 1996)

What makes a good library? For many years, library “goodness” was defined by size (of the budget, collections, staff, facilities, and so on), access, availability, and efficiency. Today, the focus is on value—that is, “How much good does this library do?”

Libraries need to demonstrate their value to customers and stakeholders. To do so, they must answer the following questions:

• What do we know about our communities to provide services and resources to make them successful?
• How do we measure our contribution(s) to user and organizational success?
• What do our stakeholders need to understand to provide the resources needed for a successful library?

A Little Metrics History

Determining value is difficult. It is much easier to count things, which is why library statistics historically have focused on numbers. As the modern library developed in the 19th century, volumes, annual acquisitions, budgets, and registered users were counted. But problems often arose with the consistency of the counts, and some librarians began to question whether volume counts were a useful means of measuring library quality.

Otis Robinson, a librarian at the University of Rochester, captured the essence of these questions when he observed in 1876, “It is as if excellence were in numbers alone. How many volumes? this is always the question; never [h]ow much and how well do you use what you have?”

Robinson did not propose a method for determining library value, but he understood that counting played little or no role in such a process. “… [T]he number of books has very little to do with their educational value,” he wrote. “Take chemistry, geology, almost any science—ten good new books may be worth more than a whole case twenty-five years old.” (Robinson 1876)

James Thayer Gerould, library director at the University of Minnesota and later at Princeton, was among the first to discuss the practical value of comparative library data. In his seminal 1906 article in Library Journal, he noted that progressive librarians ask the following questions:

• Is this method the best?
• Is our practice, in this particular,
adapted to secure the most effective administration?

• Are we up to the standard set by similar institutions of our class?

“These questions are of the most fundamental type,” he wrote, “and upon the success with which we answer them depends much of the success of our administration.” (Gerould 1906)

Gerould thought that collecting statistics in the following categories would prove helpful in administering a library: facilities, collections, finances, staff, salaries, ordering and processing, cataloging, collection use, reference transactions, and departmental libraries. He began collecting and publishing data in 1907 from a select group of academic libraries, a practice that continued (after his retirement) until 1962, when the Association of Research Libraries (ARL) took over the collection, compilation, analysis, and distribution of statistics for its membership.

Gerould clearly advocated for comparing data between institutions, primarily to discover and compare best practices that could be employed in other libraries. But although he worked with a relatively small, voluntary group of research libraries, Gerould had difficulty coming up with a standard set of consistent data. In the end, he was able to collect information only on collection size/annual acquisitions, staffing, and budgets, and even then there were corrections, missed data, and copious footnotes explaining inconsistencies.

Gerould’s data comprise the oldest comparative statistics among academic libraries, and they are usually labeled “inputs” and “library-centric metrics.” But is this really the case? We don’t know much about the specific expectations (stated or unstated) that institutions had for their libraries at that time, but it is reasonable to assume these would have included facilities for housing collections and for students and faculty to work, collections for teaching, learning and research, and efficiencies related to library funding. While these don’t get at outcomes (e.g., what they enabled students and faculty to achieve) or value, they are metrics that an institution would see as supporting its mission.

Metrics that Matter
During the past 50 years, more systematic planning processes have been developed in both the commercial and nonprofit sectors, and these have exerted a powerful and growing impact on the choice and value of library metrics. A focus on user outcomes, the availability of online and Internet resources, and increased stress on institutional and organizational finances have also begun to factor into the equation.

These trends have resulted in a shift toward metrics that measure value rather than size. As Alexander Astin noted in 1991, “Institutional assessment efforts should not be concerned about valuing what can be measured, but instead about measuring what is valued.” Martha Kyrillidou echoed this sentiment in 1998, writing “What is easy to measure is not necessarily what is desirable to measure. It is always tempting to set goals based on the data that are gathered, rather than developing a data-gathering system linked to assessing progress towards meeting established goals.”

This trend has been especially pronounced in corporate libraries. Corporate libraries, because they have had to demonstrate their value to the organization to secure funding and support, are generally well integrated into their organizational planning infrastructure. Whether through billable hours, chargebacks, or activity-based budgets, corporate special libraries have documented their value to their organization.

As competition has grown from Internet-based resources and outsourcers, special libraries have also had to demonstrate that they are cost effective in comparison with these new competitors. Joe Matthews, in his 2002 book, *The Bottom Line: Determining and Communicating the Value of the Special Library*, listed several questions that organizational management would see as critical to the library’s ability to demonstrate its contribution to organizational success. These questions include the following:

• How does the library save money for the organization?
• How does the library save employee time and increase productivity?
• What information does the library provide that cannot be obtained elsewhere?
• Does the library provide information that prevents legal problems?
• Does the library provide accurate, consistent and friendly service?

Matthews advised special libraries to use a balanced scorecard approach because it will assist librarians in “identifying what measures are important” and because it “supports the presentation of these measures in a cogent and understandable form for the management team of a larger organization.” This approach would be especially useful if the organization already uses the balanced scorecard or a similar organizational performance model.

The questions Matthews posed reflect a move away from inputs and outputs as measures of library quality and a focus instead on individual and organizational outcomes. This emphasis on determin-
ing the value of special libraries to the parent organization has generated useful research on economic benefits and user impact. Don King and his associates, for example, have used contingent valuation techniques to arrive at dollars and time saved by libraries for their organizations and employees compared to alternatives.

While there have been successful efforts to determine library value at the organizational level, they continue to be problematic for broader benchmarking, even when comparing similar organizations. Value metrics tend to be “local” due to differences in data definition and organizational missions and objectives.

**Metrics in Academic Libraries**

Academic institutions, especially research universities, have only recently focused on better defining their institutional missions and learning outcomes. Their efforts to develop outcomes-based metrics have generally been motivated by pressure from external bodies, such as political entities, governing boards, accrediting organizations, and foundations. Accrediting agencies, for example, have moved away from inputs and outputs in program and institutional evaluation to focus on outcomes. The onus now lies with the institutions to demonstrate how they meet outcomes-based accreditation standards.

For academic libraries, the trend toward aligning metrics with organizational missions and goals is being driven by changes in accreditation and the use of metric-driven allocation formulas. These changes, especially in programmatic accreditation, mean that no longer are evaluators concerned with inputs such as the number of library volumes and journal subscriptions and the size of the budget and staff. Instead, they want to know how the library contributes to student learning and success within the mission of, say, the engineering program.

Institutional accreditation has moved in the same direction. No longer do any of the regional accrediting agencies have a separate library standard; library evaluation is now integrated with other academic programs that support teaching and learning. Libraries need to be aligned with the mission and goals of the institution, and their metrics must demonstrate their contribution(s) to student success and learning.

The Association of College and Research Libraries (ACRL) has played a key role in promulgating the use of metrics that focus on outcomes. The ACRL Information Literacy Competency Standards for Higher Education, released in 2000, were designed as institutional standards rather than library standards. ACRL also commissioned an excellent study by Megan Oakleaf, *The Value of Academic Libraries (2010)*, to help librarians understand how the library advances the missions of the larger organization. Oakleaf’s work discusses specific methods for evaluating how the library affects the institution’s mission in 10 areas, and while it focuses on academic libraries, it reviews relevant literature for all library types (including special libraries) and is a must-read for anyone interested in library value.

The ACRL Standards for Libraries in Higher Education (2011) reinforce the need for libraries to align their metrics with institutional ones. For example, the standard titled “Institutional Effectiveness” includes the following performance indicators:

- The library defines and measures outcomes in the context of institutional mission;
- The library develops outcomes that are aligned with institutional, departmental and student affairs outcomes;
- The library develops outcomes that are aligned with accreditation guidelines for the institution;
- The library contributes to student recruitment, retention, time to degree, and academic success; and
- The library communicates with the campus community to highlight its value in the educational mission and in institutional effectiveness.

The Association of Research Libraries has worked with its membership to develop new measures that move away from a focus on print collections and instead incorporate e-resource usage, customer satisfaction surveys, and value metrics. ARL is a major participant in the LibValue project, which is designed to develop methods and measures that demonstrate library value in different settings. Some of the initial LibValue research has been completed, and the results are being presented and published. (LibValue also offers a searchable database of library value and ROI literature that contains more than 900 references.) Another ARL initiative, the Library Scorecard, uses the balanced scorecard organizational performance model as a way of better integrating planning, outcomes and metrics.

Changes in higher education funding models have created additional pressure to identify and use metrics to allocate budget monies at academic institutions. Activity-based budgeting (ABB) is employed in a growing number of universities where the primary set of allocation measures is related to student enrollment. ABB also taxes academic programs at a certain rate to fund both academic and non-academic support services, such as libraries. However, in most cases, the universities have not developed metrics for evaluating library value, and funding allocations are based on previous years and the current financial situation.

**Value Metrics: Whose Job is it?**

So, who should develop metrics to evaluate library value? The short answer is that no one group should do it. This process should be a joint venture that involves organizational management and leadership, the library, and the user community, as follows:

- Management needs to set expectations for the organization and delineate the library’s role.
- The members of the user community must articulate what they need to be successful in their work and the

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Benchmarking: A Powerful Management Tool

BENCHMARKING CAN BE USED REACTIVELY, PROACTIVELY OR STRATEGICALLY TO HELP INFORMATION PROFESSIONALS POSITION THEIR LIBRARIES FOR GREATER SUCCESS.

BY MARTHA HASWELL, MIS

In today’s tough economy, libraries are under increasing pressure to deliver value while holding down or reducing costs. All too often, librarians find themselves in the position of either justifying their budgets or figuring out where to make cuts with minimal damage to services and resources. In either situation, one of the most effective management tools librarians can utilize is benchmarking.

Benchmarking enables information professionals to measure and compare the cost efficiency and overall effectiveness of their library against libraries serving their competitors or peers. For higher performers in benchmarking studies, the results can be used to demonstrate the library’s value to senior management; for lower performers, the results can be used to identify gaps and make needed improvements to bring the library back into line.

Over the past 10 years, my employer, Best Practices, LLC, has conducted five benchmarking studies for corporate libraries in some of the world’s leading companies. Typically, information professionals considering library benchmarking have similar initial questions about its goals, uses, limitations, trends, and benefits. This article will address some of the most common questions we hear.

What motivates libraries to engage in benchmarking?
In our experience, benchmarking is most often driven by the senior management group to which the library reports. Management wants to ensure that corporate functions (including the library) are meeting the company’s needs as effectively and efficiently as possible. Although management commissions the study, library staff typically participate actively in benchmarking and welcome the opportunity to learn from their peers.

What key metrics are used in library benchmarking today?
Because different libraries have different missions and serve different populations at different organizations, it is rarely useful to compare size-based metrics, such as the number of holdings, number of staff, or amount of space. Libraries need metrics that translate well regardless of library or company size or location. In this regard, the three most powerful metrics are the following:

- Budget per library user, which stan-

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dardizes cost comparisons across libraries;
• Number of users per library FTE (full-time equivalent employee), which standardizes comparisons of staff size; and
• Percentage of potential library users who are actual users, which measures outreach effectiveness.

Are there any new metrics that libraries are beginning to use?
As the workplace continues to globalize, one new metric that companies are starting to value is the number of hours per day that library staff are available to assist users. Providing extended access can demonstrate value to senior management in a global company, and a few libraries with locations in multiple regions are now able to make staff available to employees 24 hours a day. These libraries are the exception, but in a recent study of 43 corporate libraries, we found that 70 percent could assist employees at least 10 hours a day (only a quarter were working the traditional 8-9 hour schedule).

Given tight budgets and high costs for specialized resources, another useful new metric is the percentage of e-content funding contributed by other departments. Libraries increasingly are asking user groups to contribute to resource costs, and many of them are having success with this approach. In a recent study, for example, 71 percent of libraries reported receiving assistance to purchase e-content. This evidence provides leverage for information professionals who want to maximize the purchasing power of library budgets.

How are libraries using data from benchmarking studies?
Savvy information professionals are using benchmarking results to manage their libraries more strategically and make senior management aware of areas where they are leading (or lagging) the pack. Among the most frequent uses of benchmarking data are defending budgets or head counts, identifying areas for improvement, eliminating services or resources that don’t fulfill a strategic need, keeping up with new technologies and methods, and identifying best practices to adopt.

For example, senior management at one company commissioned a benchmarking study in the belief that its large library might be overstuffed and overfunded. The study revealed, however, that based on the number of users served, the library was understaffed and underfunded. In addition, the library offered more services and was open more hours than many of its competitors.

What common questions does benchmarking answer?
The 12 most common questions we answer through library benchmarking are the following:
• Is our budget in line with libraries at other companies?
• Do we have the right level of staff to serve our user base?
• Where can we increase effectiveness or improve efficiency?
• Do we have the right mix of services?
• Where can we make budget cuts with the smallest negative impact?
• Are we funded from the right sources?
• Should we be charging users for services or resources?
• Are we keeping pace with new technologies?
• What, if anything, should we be outsourcing?
• What are the best ways to demonstrate library quality to senior management?
• What best practices are others using that could help our performance if we adopted them?
• What key trends should we be following?

Can metrics for large libraries be applied to a small library?
Yes. Two techniques in data analysis are used to ensure that benchmarking results are relevant to all libraries in a study, regardless of size: standardization and segmentation. Standardization involves creating and comparing meaningful ratios. For example, it’s interesting to know that the average number of library FTEs is 12.5, but that metric alone will not tell you whether a library with three FTEs is understaffed. A more meaningful comparison is the number of end users supported per library FTE. Using this example, if the benchmark average is 834 users per FTE, a library supporting 1,000 users per FTE would be comparatively understaffed, while one supporting 500 would be overstaffed. Data sets can also be segmented into groups of libraries that are similar in size, thereby allowing any library to compare itself to the most applicable segment.

What are some potential pitfalls of using benchmarking metrics?
Resource metrics (number of people, number of journals, and so on) don’t translate well across libraries and are rarely used in our studies today for identifying performance gaps. Metrics around processes and services are more useful for making comparisons.

Caution should also be taken when comparing individual metrics directly to the averages for a group of libraries that is dissimilar in size, function, scope, industry, etc. The averages for dissimilar companies provide good general, directional information, but won’t show you what your real gaps are.

A third potential pitfall stems from misinterpreting gap analysis data. For example, if data show that a library is spending much less than its peers, management might see that as a good sign, yet it may indicate that information resources are inadequate to effectively support the company’s employees.

Insufficiently defining processes and terms is another potential pitfall. For comparisons to be meaningful, clear, complete definitions are essential.

What is a “gap analysis”?
In benchmarking, a gap analysis is a method used to identify and measure performance differences between one study participant and the other participants in the study. The analysis points out the extent of the differences, identifies the likely reasons, and suggests
a path for making improvements (if improvements are indicated).

Figure 1 illustrates a cost gap between the benchmark average and one of the participating libraries, identified as “YOUR LIBRARY.” The data indicate that the highlighted library is spending 54 percent more than average on a per-user basis. The analysis suggests that several factors could be causing the gap—insufficient marketing, higher acquisition costs, or user access hurdles. “YOUR LIBRARY” should investigate these factors and make appropriate adjustments.

Another method of conducting a gap analysis is comparing your current benchmarking results to past results. Comparing your own benchmarks over time lets you assess the impact of changes you have made and evaluate the effectiveness of any process improvements. Some companies go through this exercise annually as part of a continuous improvement program.

**What data trends in libraries have you observed over time?**

We’ve identified a number of data trends in our library benchmarking over the past 10 years. For the most part, these trends have been driven by the migration of information resources in corporate libraries from print to electronic formats.

With the adoption of electronic formats, libraries have extended access to their holdings to many employees who previously were unable to use library resources because they were not within close proximity. Today, any employee with a computer can use the library. This change has doubled the percentage of potential library users who have become actual users, thereby producing economies of scale that have brought down costs and improved staff utilization (see Figure 2).

Another impact of the transition to e-resources has been an increase in the ratio of professional to administrative staff. Electronic access has reduced the need for such activities as circulation, shelving, and journal routing, allowing libraries to eliminate administrative positions that handled those tasks and reallocate funds to professional positions that require a degree in library or information science. The result is that, today, only about 19 percent of library staff are administrative employees.

Two additional changes that are being driven by the emergence of e-resources are increases in the ratio of budget dollars per library FTE and increases in the amount of funding that libraries are receiving from other departments to help pay for e-content. Figure 2 illustrates these and some other key metrics trends we have observed across benchmarking studies completed in 2003, 2007 and 2011.

Figures 1 and 2 illustrate that benchmarking is a powerful management tool information professionals can use to help them navigate their libraries through economic turbulence. Savvy librarians use benchmarking reactively to justify budget or staffing levels, proactively to evaluate the comparative effectiveness and efficiency of their operations, and strategically to win continued support from senior management. Benchmarking helps library leaders identify performance gaps, gives them a rationale for the differences, and suggests a path to improvement that, if followed, can help ensure their organizations survive and thrive regardless of the economic climate. SLA.
A decade after the release of *The High Cost of Not Finding Information* (Feldman and Sherman 2001) by the International Data Corporation, there is still a struggle to measure library services and report their impact in a meaningful manner. Calls for alignment and demands for new metrics resonate at all levels, but implementing these changes remains a challenge. Information professionals are making progress in communicating value, but too often they spend their time “circling back” with justifications rather than mapping out the path forward for a secure future in the information enterprise.

More recently, a *Library Journal* article discussed James Neal’s comments from the 2011 ACRL (Association of College & Research Libraries) Conference, in which he called for shifting away from counting and calculating and toward looking at users’ experiences. The same *Library Journal* article quoted ACRL Executive Director Mary Ellen Davis on why new measures are necessary. “The political and financial climates … make it imperative that [w]e demonstrate [that] what we are doing is making a difference, how it is making a difference, and what it is making a difference to,” she said (Fialkoff 2011).

**Contributing to Good Decisions**

While Davis and Neal were speaking of public and academic institutions, the need to develop new measures and demonstrate the difference libraries make applies to corporate and special libraries just as it does to public and academic institutions. Historically, collection and usage metrics were the standards used to justify the need for library services; over time, qualitative user experience testimonials also began to play a role in illustrating the value of the information center. Today’s complex information environment requires more than just numbers and goodwill stories, however, so quantitative analysis is becoming more critical in certain camps due to financial and political pressures within the organization.

The process of identifying who and what matters in measuring and evaluating information services may make information professionals feel as though the real value is hidden in a complex maze. Direct user service is certainly one aspect to consider, but it may not hold much weight when an organization is struggling to justify large financial outlays for a service perceived as overhead. Another angle to consider is the cost of bad information or poorly
managed information. The Information Opportunity Report stated that “poor utilisation of information assets equates to an annual £46 billion missed opportunity for private sector profits, and £21 billion in administrative costs across the public sector” (Harji 2008).

These types of bottom-line effects impose a new level of urgency on finding the best ways to measure impact and adjust services to make maximum use of an organization’s investment in information services. Information professionals must measure services and report their impact in a manner that looks to the evolution of those services in order to remain a central component of the effective knowledge economy enterprise.

Providing services that contribute to good business decisions may be the single most powerful thing that libraries can do to add value to the organization. As Feldman and Sherman (2008) noted in the IDC report, “Company executives overwhelmingly agree that good access to information is the basis for improved decision making and leads to less duplication of effort within the enterprise.”

The Information Opportunity Report indicated that while poor information quality and information systems were barriers to making good business decisions, other obstacles existed as well, including “ineffective policies and procedures, a lack of staff skills and training, the user culture, and business processes” (Harji 2008). This suggests that an information audit may be a critical first step in identifying the metrics that matter. The challenge is then to apply metrics that demonstrate value and contribute to profitable business practices while creating reports that speak to the needs of various stakeholders within the organization.

**Meeting the Challenge**

The process of using metrics to demonstrate value is influenced by the nuances of information services. Actual usage is imprecise, the value of usage is not necessarily quantifiable, and qualitative reports do not illustrate an impact on the bottom line that is easily digested in the C-suite. The conversation about metrics in libraries then comes down to the basic questions of what, who, how, where, when, and why.

Why may be the easiest question to answer in the context of using metrics to demonstrate value. Without the ability to communicate relevant data about the impact of information services on the organization, it is easy to dismiss the library as overhead, making it vulnerable to competition for funding and short-term cost savings measures. A search solution that offers ease of use, comprehensive analytics, and a seemingly simple, technology-based, one-time cost replacement is perceived as an attractive option for decision makers who may not fully comprehend the longer-term implications.

When is easy to answer—value should be demonstrated and communicated continually. Comprehensive reports should be delivered at regular intervals, such as quarterly or annually. These reports should be aligned with the reporting cycle of the organization.

Where metrics should be used and value demonstrated leads us to a more complicated answer. Information professionals move seamlessly throughout the hierarchy of their organizations, performing projects for everyone from the newest employee to the most senior executive. Information users are just one of many audiences that need to receive and share the message of the information center’s value.

From a management perspective, however, where becomes more formalized and requires consideration of reporting value in management meetings, departmental briefings and other internal channels, including intranets, newsletters and blogs.

How to report value is nearly as complex as what to report. Value should be communicated verbally, visually and, perhaps most importantly, in the language of those receiving the information. Using the terminology of organizational decision makers allows the information center to add value to the report by placing library metrics in a business decision context.

As Ulla de Stricker (2012) advocates, we need to have people with clout deliver the message of our value. In the private sector, she says, those with clout are “…the ones attached to image, brand, marketing, sales and similar functions delivering revenue and profit.” A message delivered by those responsible for making the business succeed has a larger impact than a message delivered by our everyday users.

Who is very similar to why in that end users, library champions, corporate decision makers and strategic partners (both internal and external) all need to understand the value of information services. Communicating metrics to librarians is essential to having a single message of high value communicated through all channels to the broadest possible audience of stakeholders.

What to communicate can open a world of debate that is intertwined with how to report value. There is a need to “find meaningful methods of communicating the need for, benefits and value of information services delivered by knowledgeable and capable professionals” (Ard 2012). Gaining that insight and delivering it in a manner that helps the information center require taking a look at metrics and more.

**Your goal is to identify the best method(s)**

for aligning with your organization, evaluating the services provided, and implementing changes that demonstrate the information center’s value.
The Impact of Metrics

The baseline consideration related to metrics is the need to use the right metrics depending upon the audience you are addressing. Just as a speaker or writer needs to know some basic facts about his or her intended audience, an information professional must know who will be reviewing the metrics and for what purpose(s) in order to deliver actionable and relevant data.

The information center is a mixed bag of services that consists of tangible and intangible values. The picture gets even more muddled when comparing quantitative and qualitative measures. Thus, customizing the message is critical to demonstrating and communicating the importance, impact and relevance of information services to the organization in a complex knowledge economy.

Competition within that economy influences decisions related to the funding and management of the information center. A change in the perceived value of an information center can cause a shift from a supportive environment to one that questions the relationship between costs and benefits.

So much work today is performed in a digital environment that there may be challenges related to metrics provided by third-party content providers. While Web analytics and content use metrics certainly have a place in assessing the value of information services, it would be unwise for information professionals to step away from the responsibility of owning those metrics.

“In today’s hyper-competitive and increasingly cost-conscious business environment, the full potential of automated [W]eb analytics to derive business intelligence has not been realized in [the] library,” wrote Alka Bhatnagar in a 2009 article in Online. “Without this analysis, libraries risk being marginalized in the virtual information world” (Bhatnagar 2009).

Different stakeholders will interpret the value of information services in different ways. As discussed previously, deciding what to measure is a complicated question and one that should be addressed proactively. The measurements you make should also be reviewed regularly to ensure that the metrics are still relevant.

As technology develops and usage shifts, so does the what you previously defined. No longer is it relevant to report the number of volumes you have in a collection when the message is related to value. The value derived from housing a large collection is easily challenged in the face of high real estate costs, duplicate access points, and actual usage.

The key factor in determining what to report is aligning with organizational goals and values. Identifying metrics that express how the information center meets those goals and supports those values is an important task that information centers should undertake.

How you communicate the metrics is another area that requires preparation and flexibility. One size does not fit all when it comes to reporting impact and value. While the CFO may want to just see numbers, graphs and charts, a CEO will want to tell a story that demonstrates the positive impact of information services on the bottom line. Qualitative value is much easier to share in a story than quantitative value, so reporting methods that combine the two may be the ideal solution.

Reporting for reporting’s sake is as useless as meeting for meeting’s sake. Reporting accomplishments must be accompanied by projections of how services can be adjusted to help the organization continue its successful exploitation of information assets.

From Tradition to Projection

Measuring what has been done is somewhat easier than forecasting what is to come with an eye to making service adjustments. For example, return on investment is an after-the-fact metric that definitely has a place in reporting impact. Unfortunately, as competition for funding within organizations increases and the lines between library services and information services blend and meld with other departments, ROI becomes less useful than it once was.

There are a variety of documented methods that can help you manage the business of metrics. Cost-benefit analysis, gap analysis, benchmarking and critical success factors are just a few of the available methods. Whether you use one, all, or some combination, your goal is to identify the best method(s) for aligning with your organization, evaluating the services provided, and implementing changes that demonstrate the information center’s value.

Exploiting information that resides within the enterprise is a driving priority for businesses. As The Information Opportunity Report explains, an expensive content management or enterprise search system does not necessarily improve business performance. Information professionals are critical to maximizing the information assets in their organization. Metrics are an important element in demonstrating how the information center drives the successful exploitation of information assets beyond the library.

REFERENCES


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10 Questions: Dee Baldwin

WRITING THE BEST CONTRIBUTED PAPER THAT WAS PRESENTED AT SLA 2012 WAS ONLY THE LATEST UNEXPECTED TURN OF EVENTS IN DEE BALDWIN’S EXTRAORDINARY CAREER.

BY STUART HALES

Dee Baldwin earned a master’s degree in Spanish, then took a library job years later in a French-speaking country. When she started her career in the information profession, her long-term goal was to work in a map room in Texas; instead, she spent 10 years in Africa building a library from the ground up.

Some might say Dee lacks focus, but she calls it serendipity. And she makes no apologies for the twists and turns in her career, calling her time in Cameroon “a dream job” and suggesting that her willingness to take risks makes it easier for her to accept day-to-day changes that come her way.

For example, she recently found herself presenting a contributed paper in Chicago at the SLA 2012 Annual Conference. Her paper, which was judged the best among the 11 papers presented, explains how the University of North Florida overcame technical and human challenges to implement Web-scale discovery tools. Dee hadn’t intended to write a paper about the project, but decided to do so after realizing that what she considered a minor technological upgrade was seen by many of her colleagues as a profound cultural shift.

Information Outlook interviewed Dee about her winning paper, the project it describes, and her experience with SLA. To read her paper, turn to page 24.

Your paper describes how your staff implemented Web-scale discovery tools at the University of North Florida. When you started this project, did you envision that a contributed paper would result from it?

It really started out as a project that we wanted to do because we could see the use for it in the library. I knew it would be difficult from a technical standpoint, but there were things I really felt we would get out of it.

I wasn’t at all expecting much of a human reaction to it. I’m so used to dealing with change that I just expect others to be OK with it as well, and I had forgotten that some people do not understand all of the ramifications of change. That was one of the things that got to me.

I had no intention of writing anything about the project when we started it. There had been some talk of writing papers about the technical aspects of the project, but then I said, “You know, one of the things that really got to me was the human reaction to it—how some people really took to it and others
We’ve had computer technology in the workplace for many years now. Why do you think technology upgrades are still so unsettling?

It wasn’t just that it was technology—it was a shift in the known library universe. Prior to the introduction of discovery tools, the catalog was the first point of contact in the library. You knew to go to the catalog and you would find the information you needed, or it would lead you to something else, or you might have to use a periodical or another database.

With Web discovery, we got back to a very simple time in which you had the confluence of books, e-books, electronic journals, other online resources and other indexes all in one place. That required a fundamental shift in thinking for library staff, one that I hadn’t really thought would be very difficult to move toward. Apparently, a lot of us seemed to be rooted in the catalog as the center of the library universe. In reality, the catalog is a physical representation of our inventory, and it doesn’t include all of these new and exciting tools that we have. The discovery tool pulls them all together.

That shift gave them, I think, a real start. They suddenly realized—although we had been telling them that this would come about—that the catalog, while it is a core piece, is no longer the whole. It is a part of the whole. All of those long-held beliefs that the catalog was the place to start were challenged, and there weren’t data to back up the idea that the catalog was a better place to start than the discovery tool. The discovery tool answered questions quicker and better, and it included the catalog.

Two of your colleagues, Michael Kucsak and Alice Eng, assisted you with the paper. How did you allocate duties to each person, and how well did that work?

Michael and Alice were both on the implementation team, so they had a lot of hands-on experience. What they lacked was the bird’s-eye view that I had, because I would get all of the input from faculty members who either liked it or didn’t. The three of us got together and I said, “These are the technological things that were really good about it, but I want to try to write something about the human side.” That’s how it came about.

Michael and Alice helped me with the technology and with developing an outline. I wrote the first draft of the paper; Alice did a lot of the editing. Then we all sat down together and went through the paper literally paragraph by paragraph to make sure it captured what we really wanted to say.

Once I got the paper written, we spent about four hours editing it. Writing the draft probably took a weekend after I conducted the research.

Now that you’ve written and presented the paper, do you expect to follow up later and present more findings about this project, or is this the end of the line for sharing information about it?

I think this will follow me for a while. It’s apparently taking on a life of its own that I didn’t suspect it would.

When we first started this project, I thought that our library was unique in terms of the resistance to change. But after conducting the research, I found that it was more of a common phenomenon than I realized. It seems that, particularly in Florida, the same debate is going on in a lot of the other universities. Depending on how advanced they are technologically and how successfully they get acceptance from the faculty—and in this case I mean library faculty—the Web discovery tools will
So I was quite fortunate because, at a very early age, I was offered the dream job of building a university library from scratch.

Did the paper presentation give you a different perspective on attending the SLA Annual Conference in Chicago?

I was nervous about presenting the paper, but once Alice and I got there, it was fine. I've been a longtime conference-goer and I've participated in several different ways in various conference forums, but this was my first time presenting a paper. The committee that I worked with and the people on that committee were excellent—they were very supportive and helpful. They made it very easy for us, and we felt very comfortable.

When and how did you hear about SLA, and how long have you been a member?

When I was working at the University of Florida, I had a lot of friends and colleagues who were active in the state chapter, and they were the ones who got me involved in SLA. That was in the late 1970s or early 1980s. I was actively attending chapter meetings at that time.

Then I had an interval of about 10 years while I was working on special projects in Cameroon. It wasn't until I came back to Florida that I really became a full-time member, which I've been since 1997.

You're the president-elect of the SLA Florida & Caribbean Chapter. What are your priorities for your year as president, and what special skills or experiences do you bring to that role?

At this point in my career, I really felt I had something to give back. I hadn't done enough to give back to the profession itself, so I decided I wanted to go through the process of being chapter president. It's not that I felt I could bring anything special to it—I just felt that this was the time that I should try to give something back.

We know that we have geographical issues with our chapter as well as a lack of funding. To be quite frank, we don't know how the new chapter allotments are going to work out and whether our chapter will continue. We simply do not have much outside funding. That's something Joy [Banks, the current chapter president] and I have talked about and are trying to overcome.

One of the options we used was the SLA Loyalty Project. Working with Jim Kane on the project has been a real help, but it has also reinforced some things we knew about—that the chapter board was having trouble communicating the need to do certain things to the members and getting buy-in from the chapter.

One of my goals is to make sure there's a succession plan in place for the chapter. That's something I've had quite a bit of practice doing over the years—creating a strategic plan and getting it to the point of implementation, then passing it off for someone else to put in place. Sustainability will be key for the chapter going forward.

You spent a few years working as a librarian in Cameroon, a West African country that has been in the headlines recently because some of its Olympic athletes left the team. Why did you go to Cameroon, and what did you learn during your stay there?

My whole life has been a choice that looks like it's been serendipity. When I was working at the University of Florida, I had a neighbor in my apartment complex who was a grant writer, and he was writing a grant for a university project in Cameroon. Over dinner one night he said, “You're a librarian—give me your resume.” I gave it to him, and the next thing I knew I was on my way to Cameroon. That's kind of how my life has been and how I got to go to Africa.

Once I got there, not only was I a librarian, I was also a very good ambassador for universities and libraries within Cameroon. We had a really good mix of librarians from all over the world—French, German, Canadian, British and American—all there at the same time, all working on various projects. With the help of the university library in Yaoundé, which was the national university, we all got together and tried to start a Cameroonian library.
association that would iron out things like how to deal with inter-library loan in Cameroon. That effort came about because I networked with people I knew on the various projects. And because I was there for a long period of time, I was able to develop the Cameroonian contacts as well.

So I was quite fortunate because, at a very early age, I was offered the dream job of building a university library from scratch. I had to do everything, from training the staff to making sure they could get their master’s degrees to building the collection and teaching people how to perform reference. I even wired the building! It was hard, but I loved it. If you give me a challenge, I try to rise to the occasion.

You have a master’s degree in Spanish. What impact (if any) does your fluency in Spanish have on your role and your ability to perform your duties?

When I decided on a library degree, my 20-year goal was to be at the Nettie Lee Benson Library at the University of Texas, working in their maps area. That was still my ambition when I started out at the University of Florida in their Latin American collection, which was the second-largest such collection in the United States, behind the one at Texas. I figured that from there, I could work my way to Austin.

Instead, I took that left turn over dinner and went to Africa. But I still use my Spanish—I’m the library liaison for the World Languages Department at North Florida. I speak not just Spanish but also French, and together they give me an entree into developing and using the organizational skills I have as a librarian to bring things together. If I see a need, I can usually find someone or something to fill it. That’s probably what I do best.

For me, the languages have been a passion and door opener for much of my career. But I really enjoy librarianship. It’s what I call “the art of bricolage”—you have to pull so many parts together, and that’s an art I think librarians are good at. We’re able to see what in the business world is sometimes called an environmental scan, where you survey the background and pull out the salient points. The skills that a librarian has, if used well, can take you just about anywhere you want to go. SLA
Don’t Touch that String!
There Went the Databases

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ABSTRACT

Web discovery tools can change not only the way users search and retrieve information, but also, how libraries and librarians work with information. When the University of North Florida implemented web scale discovery tools, we discovered that the technical implementation was challenging, but the most difficult changes were related to the library culture. Our students were “early adopters” moving from over 26 different entry points to finding most library materials in one search. But our staff and faculty were more resistant to the change.

Technical challenges related to implementation included coordinating the various technology pieces to customize the search interface, convert link resolvers, and to maintain interaction with the proxy server. Because of the complicated nature of web-scale discovery, we learned that no matter how much you prepare for implementation, there will be new and unexpected issues to resolve. Solutions for these problems require input from external entities and not just the library.

Cultural challenges involved library faculty and staff that had the perception that the discovery tool did not produce comparable results to a search done directly in a specific database. When we analyzed this issue, we found that not only did the discovery tool return more accurate results, but also more relevant results. In addition, the results were from databases faculty and staff would not have normally thought to use. The issue then demonstrated the need for more training for library faculty and staff to learn how to refine searches in the discovery tool to achieve maximum results.

By implementing web scale, we essentially untied the string that contained our expectations and experience regarding how search engines work and how users interact with them—and this unravelled all our previously held assumptions about how the library provides research service.

The University of North Florida Library’s internet presence consisted of access points to over 300 databases which were available to users only by subject grouping and alphabetized lists. The Library realized that we were limiting access to content by forcing users to choose a database before starting a search. Therefore, relevant content in databases that the user might not think to search was excluded. Additionally, it was difficult to becomingly increasingly difficult to maintain the subject access approach using a list. In the past, UNF Library had dabbled unsuccessfully with federated search services. We chose to look for a technical solution that could unite our databases, make access to content easy, and make searching less cumbersome for our users. So we chose to look at new web scale discovery tools to answer our needs. We looked at emerging library discovery tools such as EDS by EBSCO, Summon by Serials Solutions, and Primo Central by Ex Libris.
LITERATURE REVIEW

While web scale discovery tools are recent additions to the library market, their antecedents stem from the decades old business discovery tools that are used to data mine internal documents. Both Forrester and Gartner have tracked the software maturation process of these tools over the years. Breeding first reported in library literature the migration of these tools to the library market.1 Vaughan describes the potential of web scale discovery tools as well as the key concepts of the tool.2 He also highlighted the connection between user expectation and use of discovery tools.

Way provided one of the first analysis the impact of web scale discovery tools on full text searching as well as abstracts and indexes.3 He showed that full text searching provided greater use of content. However, he did not cover the changes that would happen to the organization.

By starting a web scale discovery project the Library ventured into new workflows. This was a major change event for the Library. It was not a one-time event as initially thought, but rather, a series of improvements made to library workflows as systems were integrated, metadata tweaked, parameters adjusted, new collections added to the index, and even personnel changes occurred.

Although Cervone wrote about new digitization projects and the impact they had on library personnel, much that he described about resistance to change in digital projects is relevant to new web scale discovery projects.4 Cervone mentioned that change in an organization should be considered when undertaking a new library project. The bulk of the responsibility usually fell on library management and the project manager. However, the expected organizational outcomes were not what are usually produced by a new project.5 Several important elements were identified by Hannan and Freeman as factors that created “structural inertia” in an organization. In their article they stated:

Some of the factors that generate structural inertia are internal to organizations: these include sunk costs in plant, equipment, and personnel, the dynamics of political coalitions, and the tendency for precedents to become normative standards. Others are external. There are legal and other barriers to entry and exit from realms of activity. Exchange relations with other organizations constitute an investment that is not written off lightly. Finally, attempting radical structural change often threatens legitimacy, the loss of institutional support may be devastating.6

We easily identified some of these factors in any library organization, but there were other factors that could very well be involved. For example, Stanley et al found that resistance to change can be primarily attributed to employee cynicism.7 Their cynicism was based on not believing in the motives of others, specifically management. Furst and Cable found that the quality of the relationship between employee and manager had a significant influence on resistance to change.8 In other words, managers who interacted with their employees frequently were better able to integrate change into an organization whereas in organizations with low levels of manager-employee interaction, resistance to change was almost always higher.

DISCOVERY SYSTEM AT UNF

In August 2011 the Web Scale Implementation Work Group formed. The work group developed a project charter outlining the scope, goals and evaluation criteria for a successful implementation of a discovery system. See appendix for charter.

The team included librarians from Technical Services, Public Services and Library Systems. In consultation with the rest of the library staff, they developed business requirements for the system. Building from the recognized problem that the library limited user access to content by forcing them to choose a database, the team defined the process in three steps.

1. The patron searches the system
2. The system returns relevant results
3. The results direct the patron to the corresponding full text

From the defined process, the work group developed web scale discovery business requirements. They wanted a system that:

1. Effectively matched its metadata to existing library resources
2. Returned relevant search results
3. Allowed users to combine facets in order to refine search results
4. Provided the option to include or exclude results linking to full text resources outside of the library’s own holdings
5. Provided prominent links to full text
6. Included detailed reports supporting analysis for the evaluation of the tool's effectiveness

The work group tested the system against the requirements with the assistance of several Reference volunteers. These staff performed dozens of searches and collected hundreds of results in order to ensure relevance and reliability.

A seamless, easy flow from discovery through delivery is critical to end users. This point may seem obvious, but it is important to remember that for many end users, without the delivery of something he or she wants or needs, discovery alone is a waste of time.8

The work group had an ambitious timeline to get the pilot project ready during the Fall Semester 2011.

IMPLEMENTATION

The Web Discovery Work Group outlined nine major issues to resolve when they implemented the Discovery System. We found that these issues were like strings. These strings were not a one to one relationship or cause and a single effect. Once a string was pulled, it unraveled several workflows or policies the library had been using. While implementing this new technology, we were, in effect, unraveling nine strings which affected the way we worked.

The first string affected library policies. The work group needed to assure that the work matched the Library policies. After reviewing the library policies, the group modified some policies and developed new policies to describe what content went into the discovery system and what content was pulled from the catalog. What they did changed cataloging and acquisition workflows. No longer would the library add all new content into the online catalog. New collections of electronic content were added directly to the web scale discovery system, this system became the new catalog for the library. This change in how collections were added then required new ways to track material ownership.

Second, they worked on system interoperability. They listed the other library systems and web content that the new discovery system would impact and decided how they would tackle system integration. The Aleph Integrated Library System (ILS) would have to export the MARC data of the print collection. EZProxy was integrated into all of the URLs for databases and e-journals to provide seamless remote access. Custom search boxes had to be created to work with LibGuides as well as the university’s content management system to ensure patrons could search directly from the Library’s home page.

Third, the work group felt that training library staff to use the new tool would be essential. They worked out a plan to train all staff on the new discovery system. The main components of the staff training were setting up user accounts, accessing search history, and sorting results. The group also set up a method for other staff members to report unexpected results, i.e. to support troubleshooting.

Fourth, the group wanted front-end customization. This included using the UNF web skins required to provide the consistent look and feel of the library’s web site. The group designed default and advanced search boxes, set up processes for how RSS feeds would be extracted, and configured a small number of databases to add within the discovery tool’s federated search portals. (These were not typical resources available or offered as part of our discovery tool.)

Fifth, the work group negotiated the contract with the discovery system vendor. They worked to make sure that the record loading was provided by the vendor and that the proper MARC record configuration was available. As part of the negotiation, price increases were capped, and the Library purchased more database content from the vendor at favorable terms.

Sixth, the work group wanted to be sure that the database content be well integrated in the new system. This was new ground for many of them as they established record loading destinations, scheduled daily record loads, extracted MARC records from the catalog, added open access databases available through the vendor, and uploaded the Library digital repository.

Seventh, honing full text functionality was crucial. The work group fine tuned the system by ranking databases according to their ability to deliver full text reliably. They also spent many hours working with the vendor on the custom linking for full text. Along the way they gathered knowledge and data on how best to setup full text linking and the link resolver.

Eighth, Facet searching needed to be concise. When the team tested the facet searching, they found inconsistencies that required resolution by the vendor. The work group considered facet searching a requirement because result sets were large and the ability to refine them was critical. The vendor worked with the group and resolved the searching inconsistencies.
Ninth, the work group was aware of two development issues that the vendor would need to work on while the work group was implementing the product. The first issue included searching Ulrich’s Periodical Directory so students could complete known projects. The second issue was if there were no full text resolution to a citation within Discovery, then the result should link to an interlibrary loan request for the user to request full-text. Neither of these issues was included in the initial study of competing systems, but they were considered critical by some of the team members upon implementation.

Within 30 days, the work group had a pilot project ready for the fall deadline.

**TECHNICAL OUTCOMES**

We were eager to see what if any changes there would be in user behavior when we rolled out the discovery system. More specifically, we wanted to see if our most expensive databases would show a good return on the investment. We established a baseline of database usage for the most expensive databases before the discovery tool was brought online. It showed the library had about 9000 full text downloads during peak term paper writing in March in both 2010 and 2011. We saw a three percent decrease in our top database usage in 2011 from 2010. While we did not add any new collections in 2011 our findings mirror Way’s pre web scale discovery implementation. We believe that this year-to-year decline may be explained by stagnation.

The Library was interested in return on investment, particularly on very expensive databases. Of our four most expensive databases, two showed dramatic increase, one displayed a mild increase and one showed a dramatic decrease. Full-text downloads from Elsevier were up 54% over the first quarter. Sage had a 177% increase. Wiley was up 3% and IEEE down 18%. The use of Elsevier, Sage and Wiley was attributed to the full text content and their relevancy ranking. There were two possible reasons that IEEE statistics declined. UNF did not require undergraduates to use the database, and the graduate program had just begun. The second reason was possibly related to metadata. IEEE metadata may not have been as robust as competing vendors, thus pushing relevancy ranking down.

One of the many strings was the decision to not load new e-book collections into the library’s ILS. We decided the catalog was a physical representation of our collection. The e-book collection was treated as a database and added directly to the discovery tool as opposed to the catalog. Statistics were derived from the web discovery tool’s administrative function. Usage during our peak paper writing period in February affirmed our decision. The library saw a 2451% increase in the e-book collection’s usage.

Figure 1. Full text downloads 2010-2011

After the discovery tool was implemented we saw a major increase in full text downloads. In the first full quarter of operation, the four most expensive databases were up over 50% in full text downloads compared to the same time period the previous year without web scale.

Figure 2. Full text downloads 2010/2011-2011/2012
We chose to make article interlibrary loan seamless with our discovery system. Meaning, if we did not have the full text, the user was sent to an auto populated interlibrary loan page without requiring authentication. Interlibrary loan decreased, supporting the theory that users were finding enough content to support their research without having to use interlibrary loan.

SHIFTING VIEWPOINTS

Web scale discovery tools represented a giant leap in how libraries provided access to their collections. Where database silos existed based on subject content or provider content, the web discovery tools united the content into one index. It no longer mattered where content resided. What mattered was a source had indexing and full content.

Walls came down on some points of view for the discovery work group and the library. This changed our way of looking at content and workflows. We shifted from a qualitative to a quantitative view point and developed new requirements for our vendors including:

- “The first question we ask database vendors is does it work with our Web scale system.”
- “If we can’t find reliable statistics to show the number of full text downloads for a given database, we cannot justify purchasing it.”
- “It is the vendor’s responsibility to provide good indexing and metadata for their product, not ours.”

We worked hard with our vendor to improve the way statistics are reported and that they were reported in a timely manner. We used vendors’ Counter reports (Database Report 1 and Journal Report 1) for our statistics. The reports were used to determine the worth of a database by measuring cost per use through full text downloads and searches. Search and session numbers reports became an irrelevant method to measure usage. Searches performed within a web scale system search every resource indexed within its knowledge base regardless of relevancy. Thus, search statistics were inflated. Full text download reports provided a better understanding of user preferences but we expected to continue exploring other methods. For example, non-Counter reports that included “linked-to” and “linked-from” data enabled us to better understand the value of a database’s metadata and the impact of indexes and abstracts.

LIBRARY CULTURE

When we started the web scale discovery project, the library did not anticipate the multitude of changes that could occur to our workflows. The work group planned for training on the new tool; however, the fundamental shift from using a traditional online catalog to discovery tool as a starting point was more difficult anticipated.
Unlike other state universities, many of UNF’s original library staff have continued to work at the university. They built and shaped the library vision for over 30 years. This influential group of original librarians long emphasized building a traditional print collection. In contrast, recent faculty hires brought a mixture of different concepts into this homogenous culture. The most notable concept was the change from primarily collecting content in print to providing content access electronically. The tipping point for the library was the influx of librarians with diverse backgrounds and strong support from the library administration.

Following the ideas put forth by Hannan and Freeman, the library had “political coalitions, and the tendency for precedents to become normative standards.” The work group also encountered Stanley’s “employee cynicalism” that the project would not be accomplished within the timeframe. Some library staff did not believe that the library administration and the work group could accomplish the necessary steps within the timeframe and consequently they were not prepared for the rapid change.

The Dean’s Office was very supportive of the web scale discovery project. One of the most critical documents for the adoption of the Discovery tools was an administrative email stating that the Library would use the Discovery tool first in reference, first in instruction and first on the web site.

Birnbaum noted that leaders can drive significant change from the top most easily in universities that are in a state of acknowledged crisis, are small, are conspicuously out of date, and have autocratic leadership.

With an enrollment of around 12,000 UNF has been called a small university. The emphasis on print collection development prior to the web scale project dated the library. We had to have a strong leadership stance otherwise web scale implementation would have failed to launch on time.

**USABILITY FEEDBACK**

Once the project was launched, the work group collected web scale feedback via presentations for faculty, one-on-one sessions with users, library classes for students and the reference desk. The core work group felt that they had done a good job ensuring that the system provided solid results. They set standards to check against over time and are still providing that data to our library faculty.

The UNF Library had several categories of database users. Each group presented different challenges to using the new discovery tool. We had Library faculty and staff, UNF faculty, UNF students, as well as the general public. For the purpose of this paper UNF Students and the general public were considered one group. For each group the usability issue or acceptance was slightly different.

**Library Staff and Library Faculty**

The web scale discovery system affected the way library faculty worked. They needed to incorporate the new system into their workflows. The resistance to change was evidenced by reluctance to acknowledge the change. Library staff did not want the new system to change the way they accomplished their work.

Creating a bridge between the comfortable and familiar to new systems that require different abilities and offer new functions was difficult. The work group provided training on how to use the new system to all library staff. Changes needed to be made in all library-related web content. Instruction librarians changed the way they taught searching using individual or subject databases to how to interpret or evaluate search results. This refocused the teaching of how to search and lead to more emphasis on critical thinking about referred journals, scholarly journals, and to discerning news bias.

**UNF Faculty**

Based on feedback gathered UNF Faculty tended to either love it or hate it. Faculty who were not heavy users of the databases easily adapted to using the new system. They liked the facets and how easy it was to use. They found more relevant articles and books and they found them easily.

Faculty that did not like the discovery system wanted only to go to certain databases. One faculty member demanded that the library go back to the way it was, but our subject area specialist/liaison resolved the issue. Our Liaison Librarians showed faculty how easy it was to use the system and helped them put links into our course system (BlackBoard). Once faculty saw how easy it was, dissent died out.

A serendipitous outcome was that faculty updated their lesson plans and had real conversations with their liaison librarians. This helped library faculty work more closely with faculty and better plan for the future.
UNF Students

The third set of users was our student population. The students were part of the born digital generation. They did not want to understand the difference in scope among the catalog, databases, digitized collections, or free scholarly content. They were accustomed to using Google and wanted similar intuitive usage.

Concerns were voiced that students would complain or not be able to do their work for their classes and that the staff would be overwhelmed at the Reference Desk. This never happened. Questions went down. Usage went up and online comments were enthusiastic. One student wrote: It took you long enough!

LESSONS LEARNED

What did we do right? We had a very detailed technical implementation plan that we followed. This helped maintain focus. Assignments were given out and milestones established. We met our deadline. The library administration was a vocal champion for web scale discovery. We implemented an effective system that worked well.

What did we do wrong? The Library did not anticipate all the drastic changes that would impact our workflows. We did not develop a good introduction to the discovery tool for all staff. Adequate training for the tool was given; however, we did not judge well the scope of changes that would need to occur in teaching the tool to the students, in talking to faculty, and in working with patrons while on the Reference Desk.

The new web scale discovery tool presented unanticipated changes affecting library faculty outside the discovery work group. The web master and the discovery work group placed the new tool prominently on the library’s home page, but neglected to consider the scope of new navigational changes and searching. Web scale discovery allowed users to simultaneously search the online catalog and databases rather than the traditional method of separate and multiple interface searching. Making the catalog an optional tab was antithetical to many librarians and was an abrupt change.

FUTURE THOUGHTS

Technology implementation is not a one time event. It is an ongoing cultural process that must be communicated frequently. Cultural change is not rapid. It can be done incrementally but we should not lose sight of the ultimate goal. While UNF thought that the resistance among Library Faculty was unique, we found that other state institutions working on discovery tools experienced similar, if not more traumatic, issues than UNF. One institution lost the battle for using the discovery tool was forced to bury it on the library’s home page. No other Florida state university has demonstrated (to date) the success that UNF achieved. We believe our result is a factor of having focused and committed to our goal.

Communication is critical. We had weekly meetings for the Discovery work group and weekly reporting to Management. We had faculty meetings to showcase the tool, but it was still not enough. We could have used more time to disseminate and talk to library faculty so that they could have started earlier thinking about the changes in their workflows that would need to happen.

Individual talks with key UNF faculty and staff about “what’s in it for me” would have been helpful. The discussions would have eased some fears and promoted the behaviors we would have liked to have seen among the faculty.

Never assume anything. A simple assumption by one team member will lead to false expectations by another team member. Clear and direct communication among the work group is essential. Repetition of ideas from one meeting to another also provides a consistent point of reference for the project work group.

Be ready to watch your organizational structure change. We found that our traditional work silos are collapsing. Lines are blurring among Public Services, Technical Services and Library Systems. We are considering a major reorganization along work group lines and flattening the organization.
APPENDIX

EDS Implementation Project Charter

Project Scope
The responsibilities of the team begins with the technical implementation of a functioning, searchable system which provides at least the minimal capabilities documented by the business requirements. A successful implementation will provide for the following:
- Integration with existing systems including CMS and EZProxy
- Training of staff
- Troubleshooting and methods of internal communications
- Reporting and statistics supporting long-term evaluation
The team has complete decision making authority over the implementation of the system. Promotion of the new system will fall under the purview of the Communications Committee.

Goal Statement
Implement the core functionality of the Ebsco EDS as the primary library search tool for the University by September 30. The system will index the library’s physical and covered virtual holdings to integrating seamlessly into our existing systems (e.g. CMS and EZProxy) providing end users with enhanced search results and direct access to full-text content online. The library will be able to use EDS first and foremost for searching, teaching and one on one instructions.

Project Team Facilitator: Michael Kucsak

Team Members:
Sarah Philips, Jeff Bowen, Alice Eng, Susan Massey, Lauren Newton, and Jim Alderman

Measures of Success:
A successful implementation will allow users to search and retrieve local and online holdings through the library website on or off campus with full-text links delivering students directly to content at least 90% of the time. Library staff will be trained in basic functionality and able to work with patrons on common technical issues. A system of problem reporting will be in place for all library staff and issues will be recorded for resolution and analysis. Reporting systems will clearly demonstrate any value add to users.

Bench Strength:
Robb Waltner (UNF) Oliver Pesch (Ebsco) Peter Favazza (Ebsco)

Timeline: The project will be completed by September 30, 2011 with the modification of the CMS site.

Endnotes


**Bibliography**


Do Librarians Need PhDs?

NEW TECHNOLOGIES ARE CHANGING THE ROLES OF ACADEMIC LIBRARIANS AND FORCING THEM TO THINK OF THEMSELVES AS ‘PARTNERS IN THE SCHOLARLY ENTERPRISE.’

BY DEANNA B. MARCUM, PHD, MLS

Has a PhD become necessary or even desirable for an academic librarian? I have considered that question more than once in my long career, sometimes to the consternation of colleagues. But as information technologies evolve, questions about librarians’ qualifications seem increasingly important. So, reluctantly, here I go again.

First, a bit of history. In 2002, the Council on Library and Information Resources (CLIR), of which I was president, hypothesized that doctoral degrees would be useful in research libraries. We created a program offering two-year postdoctoral fellowships to PhDs in the humanities who were willing to learn about library work. We designed the fellowships to foster a new kind of specialist—one who combined depth in a humanistic discipline with an understanding of information technology. We did not identify such specialists as practitioners of the “digital humanities,” but that was the idea.

Announcement of the program provoked emotionally charged letters. Some asserted that we considered trained librarians not good enough for discipline-based positions in research libraries. Some protested that our new PhDs would enter library ranks at an exalted level. Some thought our program unfair to generalist librarians who had toiled in the field for years. Others said PhDs could not be recruited into librarianship.

So, what happened?

The program has now continued at CLIR for a decade. Originally we thought that PhDs who received our fellowships would hold joint appointments in research libraries and in their disciplines’ academic departments. Instead, most of our fellows took full-time library jobs, and many of them, hoping for permanent jobs when their fellowships ended, decided not to take chances and pursued MLS degrees. After their fellowships ended, many graduates did find full-time employment in research libraries. And at least some of them, much to my satisfaction, are in new positions that combine digital scholarship and publishing with research support for students and faculty.

These former fellows have created online finding aids, reference tools, and teaching and learning resources. Their work has led to the development of portals and wikis, providing others with access to new knowledge that our former fellows helped develop. They have also organized substantial, stimulating exhibits—on topics such as cartography, literary collections, and early examples of advertising—that combine...
Competencies and Knowledge

CLIR’s fellowship program has been an attempt to try something new at a time when many organizations and librarians have been rethinking competencies that digital-era librarians may need. For example, in 1999, a grant from CLIR enabled the Association of Southeastern Research Libraries to establish an Education Committee to “investigate the educational needs of librarians to support the research library of the future.” The committee subsequently issued a report identifying desirable categories of future competence.

The report stated that the academic library of the future will “function increasingly as a teaching institution” and become an “active participant in instructional and research processes.” Librarians, said the report, will need to guide their organizations into that future by developing, managing and customizing services, collaborating with others to enhance services, and developing knowledge of “the structure, organization, creation, management, dissemination, use, and preservation of information resources, new and existing, in all formats.” The report added that future librarians will need to remain committed to “the values and principles of librarianship,” but will also need to be “knowledgeable about technology” and “often” will need “specialized subject knowledge” (ASERL 1999). PhD programs, it seemed, could meet some of these needs.

A somewhat different approach was proposed by the Special Libraries Association, which in 2003 developed a three-part set of competencies for “information professionals.” A willingness to share professional knowledge and a commitment to professional ethics were deemed “core competencies” and served to anchor the others. A second category, called “personal competencies,” comprised “attitudes, skills, and values that enable practitioners to work effectively and contribute positively” and included the ability to remain “flexible and positive in an ever-changing environment.” The third category contained “professional competencies” consisting of the ability to manage information organizations, resources, and services and to apply “information tools and technologies” (Abels et al. 2003).

These competencies seemed to emphasize managerial and technical skills, and even personality traits, more than content knowledge. As I read them, I realized that my interest in recruiting PhDs for library work reflected the needs of libraries in academic institutions. Jobs in academia require managerial competencies, but they also involve work with professors and students. Granted, academic librarians sometimes seek advanced degrees to help their patrons more knowledgeably and gain their respect, but subject matter depth, and particularly technological know-how, may come from other sources. The challenge posed by new information technologies, I began to think, might not be whether PhDs were needed, but whether the MLS degree remained adequate.

Raised in Other Environments

That question emerged with unnerving force in a provocative article, “Raised by Wolves: Integrating the New Generation of Feral Professionals into the Library,” published in the Library Journal in 2006. The author, James G. Neal, university librarian and vice president for information services at Columbia University, noted that people with nontraditional kinds of expertise not only were needed on staffs of research libraries, but already had begun to arrive.

Academic libraries now hire an increasing number of individuals to fill professional librarian positions who do not have the master’s degree in library science. . . . [They] hold a variety of qualifications, such as advanced degrees in subject disciplines, specialized language skills, teaching experience, or technology expertise. Academic libraries are also creating a wide range of new professional assignments in such areas as systems, human resources, fundraising, publishing, instructional technology, facilities management, and other specialties that demand diverse educational backgrounds. . . . The new professional groups have been “raised” in other environments and bring to the academic library a “feral” set of values, outlooks, styles, and expectations (Neal 2006).

According to Neal, professionals outside the “traditional MLS education channel” will be increasingly needed, and library administrators must treat these new professionals with sensitivity and provide them with a “more ferocious” training regimen. “New areas are emerging and already evolving for academic libraries as publishers, educators, research and development organizations, entrepreneurs, and policy advocates,” he wrote. “The MLS may not provide the requisite skills for the development and advancement these new areas demand” (Neal 2006).

Qualified support for Neal’s position came in 2007 from Stanley Wilder, associate dean of the River Campus libraries at the University of Rochester, who had been studying staff trends in academic libraries for years. In an article titled “The New Library Professional,” Wilder analyzed 2005 demographic data from the Association of Research Libraries showing that the number of people in library positions without degrees from library programs was “expanding”—up 142 percent since 1985 and 35 percent since 2000. Most of those without library degrees, he wrote, were “clustered in nontraditional positions,” but he also found that among library employees holding such positions, a substantial number did have library degrees (Wilder 2007).

Wilder reported that age had a lot to do with the positions that employees held in research libraries. For example, two of every five library professionals under the age of 35 worked in nontraditional positions, while only one in five over 35 held such jobs. He also documented a salary gap: of employees under 35, but over 35, only 7 percent

traditional and digital content. (Details may be found at www.clir.org/fellowships/postdoc/projsandpubs).
of Research Libraries, through its Transforming Research Libraries initiative, sees its members taking on “new and expanding roles” in teaching and learning (ARL 2012). The initiative declares that “developing staff capacities to engage in new work and in working with users in new ways, and bringing new kinds of skill and expertise into research libraries, are priorities for effective change and adaptation” (ARL 2010).

In light of all this, my thinking about the desirability of PhDs in libraries has evolved. I once believed that librarians must understand research and scholarly processes at a deep level to meet the collection and service needs of research institutions. I felt that earning a PhD conferred that kind of understanding. I saw the real goal as developing one’s scholarly instinct and inclination.

Now, technology has evolved to the point that scholars increasingly use new resources such as Google Scholar, with its broad ability to search scholarly literature. The role of the librarian consequently has become more “local.” The academic librarian now asks, How can our faculty learn more about the latest technological trends and applications? How can our university take full advantage of online learning opportunities? How can our teachers use these opportunities to make courses more meaningful to students?

The skills for answering such questions may come from recent PhDs who are digital scholars. But more likely they will be found in ambitious, bright young members of library staffs, trained or experienced in any number of fields.

The most important need now is for university research librarians to transform themselves into partners in the scholarly enterprise. Ithaka S+R’s surveys of faculty show that researchers have little connection to general reference librarians, but strong connections to librarians who have training in their disciplines. In the near future, generalists from MLS programs without additional degrees or experience may find employment opportunities in university libraries scarce. Meanwhile, PhDs in academic disciplines may find increasing opportunities in hybrid library-classroom environments in digital scholarship centers and institutes.

At the moment, these roles seem like sidecars—granted, intellectually interesting and better paying sidecars—attached to the traditional library. But as more students and faculty members learn to provide their own library services through Web-based resources, many traditional librarians will need to learn new skills and new attitudes. Some of the new service roles valued by faculty and graduate students are taking root in the university, but they are as likely to be found in digital humanities centers and programs as in the library.

Researchers on their own cannot take full advantage of technologies of value in their deeply rooted disciplinary practices. Librarians need to help them use these technologies—not in some separate unit out of the mainstream, but as a fundamental service of the research library. In the process, librarians may even define a new profession.

\textbf{REFERENCES}


The keynote speaker at SLA’s 2012 Annual Conference talked about baking a bigger pie, eating like a bird, and getting a shoeshine from Richard Branson.

By JILL STRAND, MLIS

JILL STRAND is director of the Information Resources Library at the law firm of Maslon Edelman Borman & Brand, LLP in Minneapolis. An SLA Fellow, she is currently chair of the SLA 2013 Conference Advisory Council and professional development chair for the SLA Legal Division. She previously served as chair of the SLA 2011 Nominating Committee, president of the SLA Minnesota Chapter, and chair of the Public Relations Advisory Council and was a member of the 2011 Conference Advisory Council. She can be reached at jillstrand@gmail.com.

For those who were not able to attend the SLA Annual Conference in Chicago and hear keynote speaker Guy Kawasaki’s talk on how to enchant people, I thought it would be helpful to write a summary of it. His presentation was full of great tips and insights into how we can better market ourselves, our departments, and our services. As you continue reading, think about how you might “act out” some of these ideas at work so I can collect and share them in a future column.

Guy was chief evangelist at Apple and later co-founded Alltop.com (and was a founding partner at Garage Technology Ventures). He has written 10 books, including Enchantment (his latest), The Art of the Start, Rules for Revolutionaries, How to Drive Your Competition Crazy, and Selling the Dream.

Guy’s Ten Tips

In his talk, Guy shared 10 tips for enchanting clients and potential customers:

Achieve likeability. He wasn’t really saying you had to get everyone to like you so much as he was suggesting that you should be genuine. For example, when you smile, make it real—use the facial muscles that give you crow’s feet around the eyes. Part of achieving likeability also means learning to accept others, because we can’t expect to be liked if we don’t like others.

Default to yes. When you meet someone new, try to think of ways you can help him or her. It doesn’t have to be a chore. For example, I met a student at the closing conference reception who mentioned that she was interested in working in a news library. Soon after the conference, I happened to see a job opening at a news organization in her area and sent it to her. It was something I could do for her in about two minutes.

Another part of this tip involves trusting others. Guy pointed out how Zappo’s, an online shoe retailer, understood that customers would want to try on shoes before deciding to keep them. Zappo’s pays both the outgoing and return shipping costs because they trust their customers not to abuse this system and believe it will make them more likely to shop with Zappo’s again. (Guess what? We do!)

Guy also advised the audience to “bake, don’t eat.” In other words, if you eat or take more, others must eat or get less. “Your gain shouldn’t mean another’s loss,” he said. “Eaters want a bigger slice of the existing pie; bakers think everyone can win with a bigger pie.” As such, bakers strive to help bake a bigger pie.

In Enchantment, he offers some examples of this advice. “Twitter made a bigger pie because anyone could provide news or updates. Google wrested advertising out of the hands of agencies and gave it to small businesses. All these companies baked a bigger pie instead of eating more of the same pie.”

Perfect your product or service and make it great. This is easy to say, but how do you do it? Guy recommended an approach called DICEE: make it deep, intelligent, complete, empowering and elegant. To break it down further: A deep cause has many features. An intelligent cause provides a great experience that includes service, support and enhancements. An empowering cause enables you to do old things better and do new things you couldn’t do at all. An elegant cause means someone cared about the user interface and experience.

Guy outlined some of the features of Ford’s MyKey product as an example. It lets you limit your car’s speed (by sounding a chime as it climbs above a certain limit), enhance safety (by activating an alarm if the driver isn’t wearing a seatbelt while the car is in motion), and regulate noise level (by setting a maximum volume at which the audio...
system can be played). All of this is pretty appealing to someone looking for a safe car for a teenage child to drive. **Launch.** Guy shared several ideas for how to get the word out about your new resources and services.

First, tell a great story and make it personal. Saying that your dad had a Cadillac and drove it 150,000 miles without any major maintenance issues says a lot more than “this car will last you a long time.”

Be sure to plant many seeds so people can find what you want them to find. After you figure out your marketing message and strategy, give up the illusion of control and just “let it rip.” You don’t always know exactly who will find your product or service appealing, so think in terms of planting fields rather than flower boxes (which could limit your reach and miss an important customer).

Finally, use salient points that will make the most sense to your customer. For example, which feature resonates better with the average non-tech person buying an iPod: the number of gigabytes of storage, or the number of songs it can hold?

**Overcome resistance to enchantment.** Again, Guy offered some ideas and examples. One idea is to provide social proof. For example, how did Apple convince customers that iPods were becoming popular? It gave them white headphones that stood out from the black headphones attached to all other devices. Suddenly, people saw white headphones everywhere, and it made them want their own iPods.

Another idea is to use a dataset to change a mindset. (This should be easy for many librarian data junkies!) Guy described using Gapminder’s Trendalyzer software to translate statistics into an interactive graph to disprove a long-held misconception that people in Western countries have fewer children and live longer than those in developing countries. (It turns out that people in most nations are having fewer children and living longer lives.) Sometimes showing something visually can communicate your point faster and more clearly.

Guy also recommended enchanting all of the influencers. Start by asking yourself who will be making decisions about taking advantage of your services or using your resources. Convincing a few key stakeholders is always critical, websites/blogs, online special interest groups, and conferences. By doing this, you increase the satisfaction that people receive from your service as well as the number of people who may help you in the future.

Finally, invoke and ask for reciprocation. Rather than simply say “you’re welcome” when someone thanks you for doing them a favor, say “I’m sure you’d do the same for me.” By doing this, you take some of the pressure off the person you’ve helped by providing him or her a way to repay the debt in the future.

**Present.** It’s all in the presentation, so start by customizing your presentation for your audience. When speaking in another city, Guy tries to arrive early and do a little sightseeing, which includes taking pictures he can include in his presentation. (Some of the pictures are humorous—one shows him wearing a very tall fez, with the shop owner grinning behind him.) If he’s meeting with a particular company and has their products in his home, he’ll include photos of them.

Guy also emphasized the need to really sell your dream. Try to avoid boring buzzwords like *patent pending* and *scalable*; instead, use your passion for what you do to talk about a dream for your services.

Try to avoid boring buzzwords like *patent pending* and *scalable*; instead, use your passion for what you do to talk about a dream for your services.
Info File

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that were way out there. He recognized that some of the best ideas can come from our wildest imagination. (This just happened recently and I’m still percolating on it, but will let you know where it leads.)

Also, consider the format. While he admitted that his own presentation included more than 70 slides, Guy suggested limiting most presentations to no more than 10 slides (with text in 30-point type) and 20 minutes. If these boundaries don’t help you focus on the best and most essential points, I’m not sure what will!

Use technology. In Enchantment, Guy goes into a lot of detail about using both “push” and “pull” technologies.

When using technology, first remove “speed bumps” (anything that will hang people up before they have a chance to hear or read your message). Have you ever visited a Website that makes you copy four or five wavy letters and numbers to register or proceed? If so, did you have trouble getting them right the first time? That’s a speed bump, and you need to eliminate it. If you’re using e-mail, personalize the subject line, keep it short, ask for something specific, and minimize attachments.

Use the technology to provide information, insights, and assistance. For instance, Alltop aggregates information by topic to make it easy for people to identify things they want to read (much like a virtual magazine rack). Taking this a step further, you could use it for finding links to items of interest to post to Twitter that others might want to read.

Finally, Guy advised us to “eat like a bird, poop like an elephant” (yes, he actually said this!). In other words, be selective about the information you “eat” (collect), but be generous in spreading it around and sharing it with clients. You will create a rising tide that floats all boats.

Enchant down (to your employees). Mastery, autonomy and purpose are strong motivators, so let people know what they need to do to master the job and why they are doing it. Then, step back and let them do it. Empower them to action by letting them know you trust their judgment.

At the same time, be the kind of boss who is willing to do dirty or difficult jobs once in a while. Don’t ask your staff to do something you wouldn’t be willing to roll up your sleeves and do yourself. For example, our library manages several different online resources and software programs. Although problems with these resources and programs never seem to arise at convenient times, I step in every so often to help clients and troubleshoot solutions with vendors.

I’m looking forward to putting these tips to work and, even more importantly, to enchanting my co-workers. Guy certainly did that—he was a dynamic and entertaining speaker, and I think most of the audience forgave him for having far more than 10 slides by the time he was finished. (To get a PDF copy of his slides, just send an e-mail to GinaPoss@gmail.com.) For more tips and engaging examples, be sure to check out his book, Enchantment: The Art of Changing Minds, Hearts and Actions (Portfolio/Penguin 2011.) And if any of Guy’s suggestions take root in your library or department, please let me know so I might share them in a future column. SLA
Collaboration in Special Library Environments

Disruptive technological innovations are creating new opportunities for information professionals to improve teams, workplaces and organizations.

BY STEPHEN ABRAM, MLS

One of the great stereotypical myths of our society is that of the solitary genius who invents or creates something out of the ether. Amadeus Mozart created brilliant symphonies, but it would have been all for naught without the teamwork of the orchestra (and, by extension, the opera houses and symphony halls and today’s broadcast, technology and recording industries that keep his music alive). Stephen Hawking is perhaps the most verifiable living genius, yet his magnificent intelligence is trapped in a body wracked by disease and atrophy. Without the talents and skills of his collaborators, publishers, university, family, and caregivers, we would know nothing of his insights and lose the human potential he exemplifies.

Genius is not a myth, but invention in solitude is. We not only stand on the shoulders of those who’ve gone before us, we depend on the support and collaboration of talents and teams that expand our own success. And it almost goes without saying that libraries and librarians play a huge role in conserving and providing access to recorded knowledge—the proverbial shoulders of those who’ve gone before us.

As information professionals who support the needs of work teams, businesses and institutions, we are well advised to focus on our relationships with clients over the course of their projects and enterprise goals. Many (and probably most) of our clients have networks that extend beyond the organization’s boundaries. By connecting to our clients’ networks, we connect to the ethos of their collaborative efforts and become part of their team. These networks are changing with the advent of enterprise intranets, expertise networks, social networks like Facebook, and business networks like LinkedIn, and we ignore these changes at our peril.

Indeed, transformational librarianship is far more about relationships than about statistics that emphasize transactional librarianship. While it’s true that social institutions like businesses, associations, colleges and universities, governments and, indeed, libraries are aggregations of individual efforts, keeping score of individual transactions detracts from the ultimate value of collaboration. Recognizing that our societies comprise diverse individuals who depend on each other for survival and progress is essential to succeeding as enterprises and as a society.

So, let’s consider the points of intersection between information professionals and our clients, teams and groups and assess them in the context of the value we deliver and the impact we have in a transformational context.

A Few Definitions

Simply put, collaboration is the action of working with someone to produce or create something. More specifically, collaboration means the following:

Collaboration is working together to achieve a goal. It is a recursive process where two or more people or organizations work together to realize shared goals—(this is more than the intersection of common goals seen in co-operative ventures, but a deep, collective, determination to reach an identical objective)—for example, an intriguing endeavor that is creative in nature by sharing knowledge, learning and building consensus.

Most collaboration requires leadership, although the form of leadership can be social within a decentralized and egalitarian group. In particular, teams that work collaboratively can obtain greater resources, recognition and reward when facing competition for finite resources. (Wikipedia)

Cooperation is the “act or instance of working or acting together for a common purpose or benefit; joint action, the more or less active assistance from a person, organization, etc., a willingness to cooperate in activities for shared for mutual benefit.” (Dictionary.com)

Teamwork is the “cooperative or coordinated effort on the part of a group of persons acting together as a team or in the interests of a common cause.” (Dictionary.com)

Social is an adjective meaning “of or relating to society or its organization.” Libraries are social institutions, as are governments, schools, colleges,
businesses, churches—indeed, nearly any human enterprise, whether formally organized or not. Social life is the basic way we achieve things. Therefore, social technology tools represent huge opportunities for social professions.

There have been some pressures on social collaboration in the past few decades. Disruptive innovations have taken technology from a mechanical retrieval and workflow context to one that is aligned with human needs and behaviors in a societal context. This transition has become more important as we have experienced the real emergence of a global information- and knowledge-based economy. This has forced social institutions to reimagine the ways their people—employees, learners, inventors, customers, and so on—interact, live, work and play.

As collaboration technologies align with the goals of society, human engagement and work, librarians must prepare for a world where we can enlarge our impact on client and organizational success even as we focus less on face-to-face interaction and physical co-location. This, ironically, might move us back to a time when special librarianship placed a greater emphasis on relationships and professional service and less on accessing information. Renewing our emphasis on improving our users in their context can be a key building block for increasing our value, sustaining our success, and surviving and thriving.

Collaborative Technologies
Technology is, in and of itself, neutral. However, when humans engage with technologies, the world gets messy. All of us can point to instances and events of cyber-bullying, online fraud, spamming, phishing, loss of privacy, and identity theft that have been facilitated by new technologies. But we can also point to the roles social technologies and digital content have played in promoting invention and discovery, making hidden content visible, reuniting families, encouraging democracy movements, and supporting the WikiLeaks government transparency movement. On a more pedestrian basis, the social Web has increased access to information, increased and/or changed our perceptions of other people and cultures, and connected people, teams, and classrooms on a scale that was unimaginable even a few years ago.

Mining the power of social technologies and digital content is a complex task requiring teams of professionals, including us. We can’t prepare employees, customers, users, researchers, partners, and learners to connect at exponentially higher rates by over-controlling their access, as doing so would damage our organizations’ success. At this point in history, we are struggling with finding the appropriate balance between access and privacy, and that balance will be different in different contexts. What is right for consumer agencies, the public sector, and the military intelligence community might not apply to medical records, the private sector, or food safety.

If there is anything that’s clear, it’s that social and collaborative technologies will play an ever-larger role in every aspect of our lives. Most of the current crop of social tools and environments will either not exist by 2025 or will have changed radically by that date. That’s OK—they represent the features and functions of an emerging ecosystem of collaborative learning, work, and play that is assembling itself on the fly.

So, what are the major puzzle pieces, and how have they changed?

Many of us in SLA participate in the success of our intranet and Website environments. I predict that, over the next few years, these environments will start to look less and less like traditional Websites and more and more like the social networks that are becoming the norm for the Web experience. Aligning our development of digitally enhanced collaboration experiences with this trend will serve us well.

Creating experience portals beyond our current information portals will underpin greater enterprise success. My standard analogy is that librarian strategies are more about verbs like informing, reading, learning, relating, and deciding than about our foundations in nouns such as content, books, databases, and records. The challenge will be to balance human interactions with the provision of quality content.

Collaboration systems like Yammer and SharePoint are rapidly becoming the norm for business and government. Our clients are encountering a world where the employer has an expectation that new hires arrive with abilities that are quite different from the model office of the last century. People will be working virtually and globally as access to talent and teams is no longer constrained by geography.

Presentation systems like WebEx and Adobe are progressing from broadcast to interactive, and this is changing everything from education to entertainment to business to politics. Learning management systems and personal learning networks in particular have great potential, and the opportunities they present have been largely under-exploited so far. This will change a lot in the next five years, as the Blackboards, Mooles, MindTaps, and D2L’s evolve to support the multiple needs, languages, learning styles, disabilities, and learning potentials of employees. As change increases its pace, these technologies will provide one of the greatest opportunities to scale learning and address the needs of organizations to adapt to a rapidly changing work revolution.

Sharing and rating systems, meanwhile, have the potential to crowdsourcing opinion and expert knowledge, even within a corporate context. The neotous systems in Amazon, YouTube and scholarly rating services are moving inexorably toward having a greater impact, especially in expert or enterprise networks focused on team or market success. Will we participate as team members, or will we be standing outside looking in? Will we be part of the team that ensures our users are able to process the difference between consumer, algorithmic, and expert recommendations? Will we be positioned as trusted advisors and team members?

All of the preceding are being enhanced by the content systems and
advanced access tools that are emerging in a post-Google world. Our users and organizations will soon have too much access and not enough context. Indeed, it’s the classic “best of times, worst of times.” As more and more of the corpus of historical and current print, audio and video content becomes accessible through digitization, the content fire hose will demand higher-order skills—in all employees, not just information professionals.

Many of us, and our colleagues, are vested in the traditions, environment, rules and processes of today. Yet we are entering a period of transformational and disruptive change at a faster pace than even that of the last few decades. To thrive, we’ll need to adapt and use our critical thinking skills and values to question the change, adjust the sails, and invest in our own development. How do we do that?

**Keep the Goal in Mind**

The best way to adapt to disruptive and transformational change is to always keep the goal in mind. What are the goals related to these social and collaborative technology changes in our industry, sector, library, or learning context?

First, we must ask ourselves—about each and every new technology opportunity—the following questions:

- Does this tool help us prepare our colleagues for the world they are encountering, in a scalable fashion?
- Can we play with this tool to better understand its potential?
- Can we ensure that this tool is worth adding to our pilots and trials to see if it shows potential for improving learning and teaching?
- Can we delay judgment until we make a professional assessment of the potential and risks?
- Does this tool support lifelong learning, collaboration, and social skills and perspectives that people will need to be successful in the community and workplace of 2025?
- Will the world be a better place with this tool?
- Does the “social glue” (the relationships and skills that bind) get better through the adoption and use of this tool?
- Are we creating a more tolerant, open and engaging society or are we risking too many negative consequences and greater divisiveness?
- What impact will this tool have on our institutional culture?
- Does this tool support the best of society—the world where new discoveries, inventions and creations are widely made, disseminated, enjoyed and used?
- Will this tool support greater progress toward a more perfect world?
- What are the inherent risks of using this tool, and how do we mitigate those risks? As information professionals, what is our best advice?

In addition to these technology-related queries, there are other types of questions we should be regularly asking within our institutions and our professional organizations and conferences. These kinds of questions can focus us in challenging times.

- How can we create amazing experiences every day for our users?
- How can we help our clients ask better questions?
- How can we make our libraries invaluable and irreplaceable in our communities?
- How can we nurture abundant curiosity?

Questions like these can guide our thinking, help us do extraordinary things, and prepare us to meet the future. These questions paint a vision of the future that is aligned with our goals and values; they allow us to create the future rather than just have it happen to us and our clients. Librarians would be a happier place, and we’d frame our challenges better, if we used this approach more often.

We can make a choice to merely stay afloat, or we can ask questions and actively seek to create the kind of future we want. So, what questions are you asking? What questions do you want to be asking? **SLA**

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**What Are We Measuring, and Does It Matter?**

*Continued from page 12*

value of the library to their success.

- The library must demonstrate that it is efficient and effective in meeting the expectations of the organization and the needs of users. The library should also develop value metrics that are aligned with organizational planning and user needs.

Finally, do value metrics matter? Yes, they do. Value metrics not only measure what is critical for organizational success, they also show those outside the library our vision for services and our commitment to change. **SLA**

**REFERENCES**


Metrics and Value

We are all expected to show value within our organizations, whether through usage statistics or through the information center’s impact on organizational success. Each organization has its own expectations and/or requirements, but it is standard practice to gather data, measure the “right things,” and regularly communicate our value to decision makers. Identifying what to measure and determining how meaningful such measures are to senior management have long been challenges for information professionals.

There are many different types of measures, ranging from direct usage (for example, the number of queries, the gate count, or the volume of database or Web usage) to qualitative measures to measures of the impact or outcomes of our services, such as linking information requests to successful sales or business cases. The simplest measures are often those we can perform easily, such as the examples of direct usage identified above. More meaningful measures generally involve much more effort to track and analyze, but they may, in the long run, be the most effective for justifying additional resources or ensuring greater understanding of the value of the information center (Hiller 2010).

Identifying the value and impact of information services may actually be easier for those operating outside of traditional information centers or libraries, such as embedded librarians or project team members. Because they are directly engaged in the projects and programs they support, the value of their skills is often much more apparent to the organization at large. But whether you are embedded or are working in a more traditional role or environment, it is important that you stay abreast of the evolving methods for tracking and identifying service value within organizations.

Mary Ellen Bates (2008) says we should “count things that matter to the bottom line.” She recommends asking questions such as “Did we meet your information need?” and “How was this information useful for you?” to gather anecdotal information; she also favors identifying a method of reporting the “value of time saved” by creating a multiplier for each hour of work conducted by a librarian on behalf of another employee. Metrics that are effective one year may not be so meaningful the next, she says, so stay attuned to how other services are showing value in your organization and try to adopt their measures whenever possible.

Three Challenges

I myself often browse business literature to see what lessons can be applied to an industry or transferred from one profession to another. An interesting example I came upon recently can be applied directly to information centers—an article titled “Transforming HRD into an Economic Value Add” (Berry 2011), which advocates for human resources functions identifying their value within their larger organizations. Many organizational services such as human resources and information centers are perceived as cost centers rather than value-generating areas and thus face obstacles when trying to communicate their value within their organizations.

The article highlights three challenges to the human resources function—from senior management, from people using HR services, and from human resources staff—that are also entirely relevant to information centers. For example, Berry notes that human resources “has not been seen [by senior management] as ‘a source of revenue or profit growth’” but says that “by linking HRD solutions to specific business results, such as revenue-related metrics, senior management will begin to see [human resources] as a source of competitive advantage.” This is a model we can also apply directly to information services.

As for the people who use human resources services, Berry explains that they perceive such services as “transactional” in nature, as “the end game rather than a means to increased business performance.” This is similar to the dilemma faced by information centers, where customers think about getting a particular problem solved or an answer provided, but may not consider the service as integral to the success of the business.

The third challenge Berry identifies is how employees who provide human resources services are often impediments themselves to changes that facilitate the measurement of HR’s value and impact. “Colleagues may not be happy with your use of measurements that focus on how your solutions improve the organization’s performance,” he
writes. While our profession has always had the resiliency to change and adapt to the expectations of our organizations, we need to think about different ways of measuring and sharing the value of the information center, and there are other services that may help us determine how we can do so.

**Confirm and revise the information center’s goals.** In addition to changing the way information services are viewed in the context of the organization (modeling it after the human resources example), you can also ensure that you are measuring the correct things by focusing on aligning the information center’s goals with the organization’s goals. The first step is to examine all of your existing services and activities with a view to how they contribute to organizational goals. If there are areas that are not in alignment, you need to consider how much effort is required to create and maintain these services and identify the true value of continuing to offer them.

**Identify and implement metrics to show this value.** Ask yourself what you need to evaluate. Is it value, efficiency, satisfaction, or outcomes? Can you evaluate and communicate the value of your service in a similar manner as other departments in your organization? Will this help senior management understand what you are contributing to the bottom line?

Try to track the end use of your services. If you are able, assign individual information professionals to projects to create a closer connection to your end users and help them understand the integral role that info pros play and how they contribute to project success. Build and sustain supporters, as this is one of the best ways to track usage and support and also alert you to any downturn in perceived quality of service.

**Review and modify.** Review what you are measuring and why you are measuring it. Do this regularly (at least on an annual basis), depending on new projects or organizational changes. Focus on aligning the information center’s goals, both in intent and in language, with the broader goals of the organization. Always ensure that you are measuring in a way that will have meaning to your organization and industry.

For support, encouragement, and good ideas, look to your SLA colleagues and participate in SLA Webinars and conference sessions. The best way to prepare for the future is by staying connected and learning from the many good ideas that are shared within our profession. **SLA**

**REFERENCES**


WEBINARS

Insider Insights: How to Research Companies and Industries as Potential Employers

It’s 2012, and looking for a job has changed drastically since 2002. Sure, you can go to the U.S. Bureau of Labor Statistics site or the Occupational Outlook Handbook to find information on industries and career paths. But what else is out there? What will give you the inside information you’re really looking for: skills you need, current salaries, company culture? Who can you talk to about the industry and where it’s headed?

In this session, you’ll learn about traditional and non-traditional sources for industry and company information, and how to reach the people and experts you really need to talk to. Whether you’re starting a new career, or looking for a new twist in your career, you’ll learn practical approaches that will help you right now.

Date: 10 October 2012
Time: 1:00 – 2:30 p.m. Eastern time
Cost: US$ 49 for SLA members, US$ 129 for non-members

Who Should Attend:
Information professionals looking for a change in their career; new graduates who are entering the job market; and job seekers and career changers from any field. Information professionals who are interested in finding industry and career information will also gain valuable tools from this session.

Presenters:
Scott Brown draws on 20-plus years of experience in library and information organizations (including public, academic and corporate settings) to bring an extraordinarily broad range of expertise to his LIS career coaching. He is the owner of the Social Information Group, an independent information practice focused on the effective use of social networking tools for sharing and finding information. He was a founding board member of the SLA Competitive Intelligence Division and teaches competitive intelligence topics as an adjunct faculty member at San Jose State University in California and the University of Denver in Colorado. Follow Scott on Twitter at @scbrown5 or @socialinfo.

Kim Dority is the founder and president of Dority & Associates, an information strategy and content development company focusing on research, writing, editing, information process design, and publishing. She is also on the advisory board of the University of Denver’s MLIS program, where she created and has taught a popular course on alternative LIS career paths. She has spoken on a wide range of LIS career topics at national conferences and addressed LIS graduate student groups on career development strategies. She is the author of Rethinking Information Work: A Career Guide for Librarians and Other Information Professionals and manages the LinkedIn “LIS Career Options” group. She currently serves on a task force that is updating SLA’s Competencies for Information Professionals of the 21st Century.

Critical Learning Questions:
• How can I identify the most useful resources for gathering company and industry information relevant to my job interests?
• How do I find the current information I need to pursue a new direction in my career?
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