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Fall 2005

BF BULLETIN

BUSINESS AND FINANCE DIVISION
SPECIAL LIBRARIES ASSOCIATION
EST. 1958

Nr 130

In this issue...

BULLETIN

Fall 2005 · Nr 130

Contents

INSTRUCTIONS TO AUTHORS

- Submissions via electronic mail are encouraged.
- Either MS Word or ASCII files are acceptable.
- Please submit copy after verification, bibliography checking, spell checking and proof reading.
- Use a recent *Bulletin* issue as your style guide.

COPY DEADLINES

- WINTER 2006 issue, Nr 131: *DECEMBER 1, 2005*
- SPRING 2006 issue, Nr 132: *MARCH 15, 2006*
- FALL 2006 issue, Nr 133: *AUGUST 15, 2006*

Peer-reviewed articles require additional time for the review process. Authors who wish to publish a peer-reviewed article should contact the editor for further information.

From the Chair...

Toby PEARLSTEIN
Bain & Co.

The road from Toronto to Baltimore

■ Reflecting on this year's annual conference, held in Toronto in June, it's hard to believe we are already fully engaged in planning the Division programming for SLA Baltimore in June 2006 and have been for a few months! It's especially challenging to follow such a successful effort put forth by Sylvia James, Past Chair, and many others. Thanks to all those who worked so hard to make SLA 2005 such a success.

In January 2006 we hope to have set an equally exciting set of programs for you to enjoy in Baltimore. Hal Kirkwood, Chair Elect, is already working hard to plan for the Denver conference in 2007!

The SLA Baltimore Program Planning Committee has some interesting changes in store for conference attendees including "shaking up" the scheduling of Key Note speakers and asking each Division to offer only 10 programs. Co-Sponsoring programs is being heartily encouraged so you'll see several sessions where B&F is partnering on topical programs that address the needs of multiple divisions. Hopefully this will cut down on the number of conflicts members are faced with when trying to choose which programs to attend.

Chris Hoeppner and his CE team are also hard at work. They are currently filtering through the many proposals for Division CE courses that were received in August 2005. All Baltimore courses must be approved by SLA before we can offer them to our members.

Programming on tap for Baltimore include a Focus on Asian Sources, the Role of the Information Professional in Risk Management Related to Copyright, a Panel of Senior IS Professionals talking about staying energized and engaged in their profession, and Researching Entities that Don't Want to be Researched (such as professional sports teams).

I'm confident that when you open your preliminary program for Baltimore you'll see a strong slate of 1/2 day and full day CE learning opportunities offered by B&F and a variety of Division sessions that will stimulate your personal and professional interests.

What's on Tap for 2005-2006

Direct services to our members

- You'll soon see a re-energized Division Web Site with updated Resources under the leadership of Verna Riley our Web Master and a team led by Karin Rausert, Web Content Manager
- Revitalized Mentoring Initiative led by Steve Marvin who is exploring the use of a Community of Practice platform on the Division Web Site for this initiative.
- We are reviewing the way we celebrate our award winners and will have something special planned for Baltimore
- Hal Kirkwood, Chair Elect, is working with the Division's Sections and Real Estate Round Table to facilitate their programming for the Baltimore conference
- Vicky Platt and others are preparing for the transition to an e-Bulletin in late 2005

Back office improvements

- We are creating a Division Operations Manual to document how the Division works – an effort led by Gayle (Kiss) Gossen. *(continued on pg 4)*

EDITOR'S EPITOME

Vicky PLATT
Willamette Management Association

■ Eight months ago the winter edition of the *Bulletin* was in the process of being edited when the world came together in support of the Asian Tsunami victims. Once again, editing the *Bulletin* takes place during a horrific natural disaster, but this time much closer to home. The world has banded together in support of Hurricane Katrina victims in much the same way as it did for the Tsunami survivors. However, the daily storing-telling of American's helping American's is completely inspiring.

After all of the articles were gathered for this issue, I was once again inspired. This time it was by the many dedicated and talented members of the Business and Finance Division. The story-telling in this issue recalls the wonderful presentations made at the annual conference in Toronto, shares the incredible achievements of award and stipend recipients, discusses projects being implemented for the benefit of our division, and provides insight on professional challenges.

The fall issue is always the largest *Bulletin* published each year. I hope you find it full of useful information and a welcome addition to your reading material. While I know that some of the issues mailed to the Gulf region will be returned, I hope all of our members affected by Hurricane Katrina are having their needs met and will rejoin our division as soon as time permits. We look forward to your swift return.

Regards,
Vicky Platt

SLA COMMUNITY

Communities of Practice
Business Partner Community
Membership Directory
SLA Connections newsletter

http://www.sla.org/content/Community

FROM THE CHAIR • *continued from pg. 3*

Focus on Membership

- We will continue our focus on membership—an effort begun in 2004 and being led by Cris Kinghorn
- Attracting new members - we are planning a student program and reception in Baltimore as a way to show students the value of being members of B&F—led by Steve Kochoff.
- Looking at ways to keep long-time members engaged in the work of the Division

If you are interested in participating in any of the activities mentioned above, please contact me at: toby.pearlstein@bain.com.

Regards,
Toby

CONCERN FOR THOSE IN NEED

Members of the B&F Division Executive Board extend their prayers and thoughts to our colleagues and their families who are victims of the devastation created by Hurricane Katrina and its aftermath.

We urge our members to do whatever they can to help these folks get the emergency assistance and support they need. For those of you who are interested in donating to these relief efforts, here are two organizations collecting aid:

American Red Cross

Donations made to the American Red Cross Disaster Relief Fund enables the Red Cross to provide shelter, food, counseling and other assistance to those in need.

Call **1-800-HELP NOW** or **1-800-257-7575** (Spanish).
Donate online at
https://www.redcross.org/donate/donation-form.asp

The Salvation Army

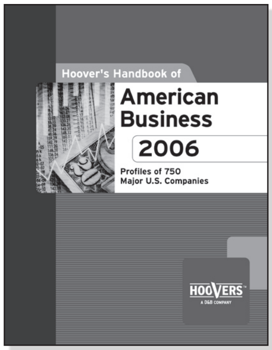
"A $100 donation to The Salvation Army will feed a family of four for two days, provide two cases of drinking water and one household clean-up kit, containing brooms, mops, buckets, and cleaning supplies," the website states.

Call **1-800-SAL-ARMY**
Donate online
https://secure.salvationarmy.org/donations.nsf/donate?openform&projectid=USN-hurricane05

The need is great; we hope you'll dig deep.

Toby Pearlstein
Chair

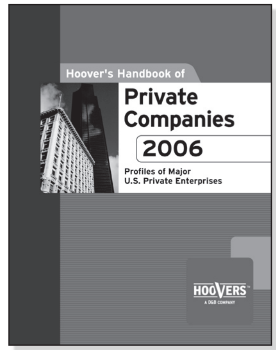
HOOVER'S 2006 EDITIONS



HOOVER'S HANDBOOK OF AMERICAN BUSINESS 2006

Profiles 750 of the largest and most important U.S. companies.

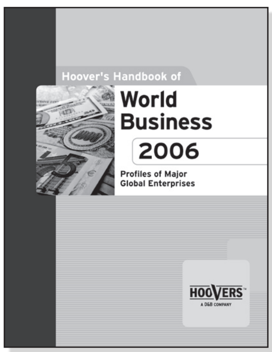
$235.00 • ISBN 1-57311-108-2
16th edition, December 2005
1,005 pp • 8-1/2″ x 11″ Hardcover



HOOVER'S HANDBOOK OF PRIVATE COMPANIES 2006

Includes coverage of 900 of the largest private U.S. business enterprises.

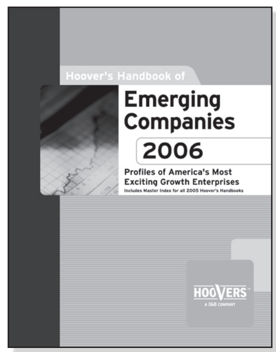
$170.00 • ISBN 1-57311-109-0
11th edition, January 2006
586 pp • 8-1/2″ x 11″ Hardcover



HOOVER'S HANDBOOK OF WORLD BUSINESS 2006

Features profiles of 300 of the most influential companies based outside the U.S.

$185.00 • ISBN 1-57311-110-4
13th edition, March 2006
398 pp • 8-1/2″ x 11″ Hardcover



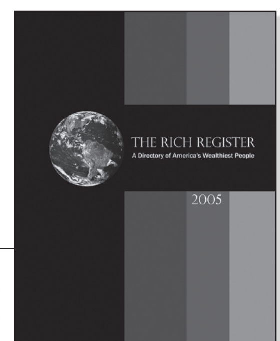
HOOVER'S HANDBOOK OF EMERGING COMPANIES 2006

Covers 600 of America's most exciting growth companies and includes a combined index for the Hoover's Handbooks set.

$145.00 • ISBN 1-57311-111-2
13th edition, April 2006
520 pp • 8-1/2″ x 11″ Hardcover

Featuring 4,700 individuals with a net worth greater than $25 million, *The Rich Register* is America's only net worth-based wealth directory compiled by individually investigating wealthy people through various public and private sources.

Also available as a comma-delimited text file and an Excel spreadsheet on CD-ROM.



The Rich Register 2005, print edition
$299.00 • Hardcover • 8-1/2″ x 11″
678 pp.

The Rich Register 2005 on CD-ROM
$299.00

The Rich Register Book and CD-ROM
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BUSINESS & FINANCE DIVISION PROGRAMS AT SLA'S 96TH ANNUAL CONFERENCE

Toronto
June 4-8, 2005

SYLVIA JAMES
Chair of Business & Finance Division 2004/5

■ Traditionally, B&F, being such a large Division of SLA, has always had sessions in all the available slots of Conference, as well as a series of business meetings, social and networking events and several Continuing Education (CE) courses during the weekend before Conference begins. Toronto this year was no exception and B&F staged 26 events; 6 main conference sessions, 2 Board Meetings, a Business Meeting and Lunch, 6 breakfasts, an Awards Reception for the Centres of Excellence Award, 4 Open Houses and 6 CE courses. Quite literally, B&F as a Division annually holds a conference within a conference.

From my "Letters from the Chair" this year for the *Bulletin*, you may remember my discussing the long lead times and the amount of detail needed to plan the B&F events for the Conference. The work involved certainly intensified during April and May this year and by the time I arrived in Toronto, I could hardly believe that the time had finally come to actually see all that work and planning come together. Gayle Kiss, our Executive Board member based in Toronto, was also deeply involved in on-the-ground planning. I'm sure Gayle felt the same way when we met to discuss final conference details on Friday June 3rd during a pre-conference lunch with members of the B&F Board.

The SLA conference had not been held in Canada for some 10 years. It was very interesting to be so closely involved with events that would be held in Toronto, a favourite city of mine to visit. Well, having finally got to the Conference, predictably, it all passed me by as a blur and there wasn't much time to experience the sights of Toronto.

Fortunately for me, I ensured that I had a few extra days in Toronto before everything started. I went through all of the arrangements at the hotel and conference centre, as each of my conference days was mapped out by the structure of the B&F events, from our first CE course on Saturday to our closing session on Wednesday. All the myriad of details, from the signs outside the rooms to thanking the speakers and sponsors, which I have always taken for granted in attending the Conference for so many years, were my responsibility this time.

This year, we decided as a Board to obtain qualitative data about our conference sessions. A couple of B&F Board members, Gayle Kiss & Cris Kinghorn, arranged for a group of student volunteers from the Toronto area to carry it out for us. Thank you to any of the B&F members who helped with this and I'm sure Toby Pearlstein or myself would be happy to receive any further comments, ideas, or offers of help on B&F Conference activities in the future. I would also like to take this opportunity to thank all the Toronto based student volunteers who helped us with this and the CE courses.

We had the (almost) predictable heart fluttering near disasters that presumably affect every conference planner. One of our keynote speakers, Daniel Franklin, Managing Editor of the Economist Intelligence Unit (EIU), had a very unfortunate accident the week before the Conference, seriously breaking his arm and was unable to fly to Toronto. We were very fortunate in that the EIU Chief Economist, Robin Bew, very kindly offered to fill in for Daniel and gave a fascinating and very understandable review on the state of the world economy. His full paper is available on the main SLA website, see **http://www.sla.org/content/Events/confpresentations/05confpresent.cfm**

There were also a good few alarms and dispersions with several of our networking and catered events, which all worked out well in the end.

The CE courses kicked off our program on Saturday and Sunday and were considered by all who attended them to be a great success. These courses are the way we can bring you a more detailed approach to business and finance information topics presented by a range of first class practitioners. Chris Hoeppner, our Executive Board Director who organised the CE sessions this year reports in more detail below.

We had arranged a set of our very popular Open Houses for every night of the Conference and Kevin Manion, our Executive Board Secretary, ably took charge this year and also reports on them at the end of this article.

Our main program began on Monday morning following a traditional and well-established breakfast sponsored by Standard & Poor. We were also most appreciative of Sam Stovall's S&P's Chief Investment Strategist, frank and entertaining comments. Our B&F main sessions included 2 keynote sessions, one from Robin Bew and the other from Linda Sims, Business Editor of the Canadian TV's "Newsnet". Linda gave a presentation on the capture of business news for her TV appearances and held a lively Q&A session on business news for TV.

Trying to address our broad constituency in the Division with other programming, we presented sessions on Researching International Markets – The Statistical Approach, with speakers from Statistics Canada and the University of Toronto. The session on Anti-Money Laundering by Anil Mathur from Merrill Lynch Canada, and from Lehman Brothers in New York, Marty Cullen and Jim Holderman, introduced the audience to a new career opportunity for business information specialists. By accurately describing their roles they can help their financial institutions use information in a systematic way to counter criminal activity.

We also presented a new and interesting session on Monday June 6th, where we invited all of our 2005 sponsors of B&F activities to prepare short presentations specifically about how/if they are using the newest technologies (PDA's, RSS feeds, etc.) to deliver their content into user workflows. Six of our thirteen sponsors responded and we had fascinating insight into the future of this technology from Alacra, Business Monitor International, Dialog, Factiva, ISI, and Lexis/Nexis. Thank you to all the presenters for a fascinating look into the future and to them also for their support of our events in Toronto.

Our other very generous sponsors for the Conference were Alert Publications Ebsco, Global Reports, InfoCurrent, Mergent, ReferenceUSA and Standard & Poor's. It was a pleasure to meet all of them when Chair Elect Toby Pearlstein and I visited their booths in the Exhibition Hall.

Following the very successful conversion of most of our Roundtables into Sections this year, the new Section Chairs put together an excellent selection of Breakfast sessions with the help and direction of Toby Pearlstein. At the Investment Services Section Ian Hague, from the Accounting Standards Board of Canada, gave an excellent account on the progress in harmonizing international accounting standards. At the Corporate Business Centers Section Breakfast there were good presentations on Outsourcing from Kevin Manion of Consumer Reports and John Marchant of Business 360. Roger Strouse, from Outsell, presented Needs and Strategic Assessment for the Financial Institutions Section. The College and University Business Libraries Section presented a panel discussion on Current Issues in Academic Business Librarianship from Glenn McGuigan and Greg Crawford of Pennsylvania State University and Gary White of the Schreyer Business Library. The new Private Equity Section held a more informal event. A fuller description of these sessions follows this part of the article in the reports from each of the Section Chairs

On Wednesday there was a session on "Presenting Business Information"; a panel discussion held on Wednesday June 8th on how to structure and present business research, which was sponsored by "Business Information Alert". Communicating the results of business research effectively to users can be just as important as carrying out the research itself. The session took the form of a seminar that examined the methods, formats, presentation and writing skills that can be used to distinguish business information output to users. This was moderated and summarised by Vicky Connor and featured Amelia Kassel of MarketingBase & Andrea Thomas of Ernst & Young. This session was aimed at our newer members and was very well received.

Lastly, the Division recognised outstanding individuals in the business information world at the SLA conference. This year, the Division's Outstanding Achievement Award was presented to Chuck Popovich of Ohio State University for his work as the Editor of the Journal of Business & Finance Librarianship. The National Geographic Society's Libraries and Information Services received the Division's other major award, the Center of Excellence Award in Management. Our stipend award winners and new international award winner are described and pictured in the separate review of the B&F Business Lunch from the winner, Vernon Totanes, where they were presented with their awards. Thanks to Cindy Lenox, past Chair and her Awards Committee, Bob Clarke, International Relations Chair and Awilda Reyes and her Stipend Committee for finding such worthy recipients.

On Tuesday evening, we organized a well-attended and very pleasant new B&F Reception in honor of the Centre of Excellence Award, which was sponsored by Mergent. The full details of this award for 2004/5 are detailed in Hal Kirkwood's article in this issue.

Returning home on the plane from Toronto, I reviewed the events I had been working on for so long and felt quite sure that the B&F Division had been well served by our programs this year. I hope too we have served the wider dissemination of business information. If you are a member of B&F who attended the Conference, I hope you agree.

I am indebted to all work put into this conference by the members of the B&F Executive and Advisory Boards. I also thank B&F members who helped to ensure the content we presented for our members and the business information community was of the high quality. A really big thanks to you all.

REVIEW OF SESSIONS

ANNUAL BUSINESS MEETING & AWARDS LUNCH
Tuesday June 7th

summary by International Award Winner
Vernon Totanes

■ I was able to attend the 2005 Annual Conference of the Special Libraries Association (SLA) because I applied for and was given an International Travel Award, which was sponsored by ISI Emerging Markets and administered by SLA's Business and Finance Division.

The "Annual Business Meeting & Awards Lunch" of the Business & Finance (B&F) Division was a more formal event than most of the other sessions. It was not just a stage-and-chairs affair; there were about fifteen tables with room for ten people each. And, of course, food was served.

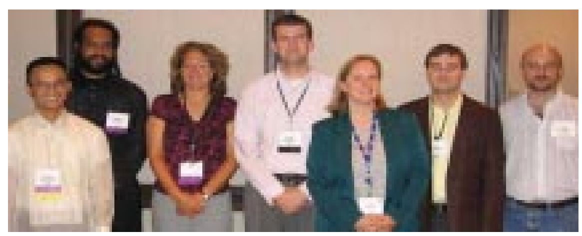
The people were nice and seemed to be better-dressed than usual. The food was a real meal because we even had salad and dessert. The business meeting went smoothly. But that's about all I can remember... because I couldn't really concentrate. All I remember thinking was, "I'M GOING UP THERE AND I STILL DON'T KNOW WHAT TO SAY!"

It's a good thing there were six other recipients of professional grants and student stipends, so I was able to organize my thoughts. (By the way, I was told that I had to deliver a short speech after receiving my award only when I got to the venue.) And then it was my turn.

Robert Clarke, chair of the International Relations committee, gave a brief background on the International Travel Award, and that's when I found out that I was the first recipient of the award (more pressure!). He also introduced James Hammond III, executive vice president of ISI Emerging Markets, who then called me to the stage and gave me the award.

From left: Robert Clarke, James Hammond III, and me

I told them I had three things I wanted to say:
Thank you to the Business & Finance Division and ISI Emerging Markets for giving this award for the first time;
Thank you for giving me the award (this got a few laughs); and
Thank you for requiring that applicants write an essay. I posted mine on the Internet (see "Librarians as Leaders") and this new kid on the block received good feedback about it from some of the most influential librarians in the Philippines.



with the other awardees, from left: Terence Forsythe, Claudia Cohen, James Wiser, Laura Tuers, David Gibbs, and Alexey Panchenko

■ ■ ■ ■ ■

RESEARCHING INTERNATIONAL MARKETS
- **Peter Lys**
  Mike McCaffrey
  Wednesday June 8, 2005

summary from Moderator
Gayle (Kiss) Gossen,
Rightcontent

■ Peter provided an overview of statistics collected by Statistics Canada and how they fit into products and services that can be used for business purposes. This overview included how to find and what information is included in The Daily, CANSIM, and many other reports published by Statistics Canada.

Mike provided an overview of classification schemes, documents and reports produced by Intergovernmental Organizations. These organizations write these reports for an intended purpose, not for sale. Focus on certain organizations such as the UN, World Bank and International Money Fund to avoid getting too much information.

Kindly sponsored by Business Monitor International

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PRESENTING
BUSINESS INFORMATION
Amelia Kassel
Marketingbase
Andrea Thomas
Ernst & Young
Wednesday June 8, 2005

summary by Moderator
Vicky Connor,
Deutsche Bank

■ This was a "how to" session on the basics of presenting research findings. It was aimed at practitioners who undertake research requests or managers of teams performing this role. Speakers came at the topic from two standpoints - Amelia's talk was more from a consultant's focus, while Andrea's was more from a traditional information department.

Amelia spoke first and covered the following areas.

- Why do it?—demonstrating and communicating your value, expanding role, increased responsibilities and status, being proactive, potential for new business— the pay off is big.
- Requirements—new attitudes, new knowledge, buy-in from customers, funding needed.
- Skills—excel skills, writing skills.
- What to do—basics like organizing research results, post processing, fonts, bolding, spacing, synthesizing raw data, suggesting next steps to customers, should you include opinions?
- What not to do—don't try to interpret data you know little about.
- Templates—for tabular or graphical requirements, branding etc.
- Value added databases such as patent databases, Alacra Book, analysed reports on Onesource etc.

Andrea's main message was how to achieve higher customer satisfaction through enhanced presentation. Andrea used her presentation to include more practical examples and covered:

- Creating templates and deliverables, with lots of examples of the same data in text format and presented graphically—this seemed to go down well with the audience.
- Other formats such as newsletters, executive profiles, and industry profiles— with examples.
- Increased demand for internal research services when customers see the value of your output. Internal marketing
- Co-developing templates with customers, seeking feedback, keeping up to date.
- Career growth

Sponsored by "Business Information Alert" (Alert Publications)

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SECTION BREAKFASTS
All held on Tuesday, June 7, 2005

College and University
Business Libraries Section
Breakfast Presentation

TRENDS IN ACADEMIC
BUSINESS LIBRARIANSHIP
- **Greg Crawford, Glenn McGuigan, Gary White**

summary by
Glenn McGuigan

■ Penn State University librarians delivered three presentations on trends in academic business librarianship. Greg Crawford, Head of Public Services, Penn State Harrisburg, spoke on research trends. Glenn McGuigan, Business Reference Librarian, Moderator, and CUBL Section Chair, discussed collections issues. Gary White, Head of the Schreyer Business Library, Penn State University Park, addressed proficiencies and trends in the profession. Presentation slides are available on the Web at **http://www.hbg.psu.edu/library/presentations/**

Presentation by Greg Crawford entitled *The Journal Literature of Business Librarianship.* Greg Crawford is Head of Public Services, Penn State Harrisburg Library. This research examined the literature of business librarianship as identified through a search of *Library Literature.* The search yielded 511 journal articles for use in the study. The results indicate that 130 different journals published articles on business librarianship with only 13 journals publishing 10 or more articles. The journals publishing the most articles included *Business and Finance Division Bulletin, Journal of Business and Finance Librarianship, Reference and User Services Quarterly* (and *Reference Quarterly*), *Library Association Record*, and *Library Journal.* A total of 474 authors were represented with an average of 1.05 authors per article. The average number of articles per year was 23.2. A subject-indexing scheme was developed from the articles and yielded 37 subjects. The most popular subject was "programs and services for businesses." Only 78 articles written by 68 different authors could be classified as research and these articles came from 46 journals. There were an average of 3.9 research articles per year and these articles represented 24 of the 37 subjects. The most frequent subjects of the research articles were collections and information needs.

Presentation by Glenn McGuigan entitled *Academic Collections in a Time of Change.* Glenn McGuigan, Section Chair of CUBL and Past President of the Central Pennsylvania Chapter of SLA, is the Business Reference Librarian at Penn State Harrisburg. For his presentation, Glenn discussed the transformation of collection management in the academic environment. The topics included: a brief overview of some developments in the field, a discussion of the scholarly journal publishing industry (with a focus on periodicals), and related to that, a discussion of the serials crisis. In conclusion, he addressed responses and predications for changes that are on the way regarding the scholarly publishing system. In asking what can academic business librarians do to help solve the serials crisis, Glenn recommended that academic business librarians study the serials crisis as a business problem and engage in dialogue with teaching faculty on the subject.

Presentation by Gary White entitled *Trends and Proficiencies in Academic Business Librarianship.* Gary White is the Head of the Schreyer Business Library, Penn State University Park and is the forthcoming editor of the Journal of Business and Finance Librarianship. Gary spoke about proficiencies and core competencies for business librarians. He presented findings from a content analysis of syllabi of business information courses at ALA accredited graduate programs in library and information science. Gary also presented findings from an analysis of open business librarian positions during the past year, and discussed the qualifications that employers are seeking and how well these qualifications fit with the content of courses in library and information science programs. Gary also spoke of current trends in business libraries' collections and services.

The Breakfast was kindly sponsored by Business Monitor International

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Corporate Information Centers Section

RESEARCH OUTSOURCING

John Marchant
Business 360
Kevin Manion
Consumer Reports

summary by
Cynthia Lesky,
Threshold Information Inc.

■ The breakfast program of the Corporate Information Centers Section, formerly the Corporate Libraries Roundtable, featured presentations by John Marchant of Business 360 and Kevin Manion of Consumer Reports. The title of the program was "Research Outsourcing: The Industry Landscape & a Portrait of One Firm's Experience." This program was intended to continue the conversation on outsourcing that began in Nashville. That meeting presented the formal outsourcing experiences of Lehman Brothers and PepsiCo.

John Marchant's presentation titled "Business Research and Information Services: Outsourcing and Offshoring" gave the industry or "landscape" view of outsourcing. John presented comments on and insights from a survey done by Business 360 in partnership with U.K.-based consulting firm TFPL in 2004. The survey focused on respondent experience with business research outsourcing. Here are just a few of the insights that John shared:

Drivers: Information centers sought outsourcing or "at-distance research" relationships in order to enable them to internally refocus on core activities and services provision, to increase the quality of the information they delivered to their clients, and to offload certain management responsibilities like training, resourcing, and quality control. Cost savings, or at least budget flexibility, was also an important driver of interest in outsourcing.

Issues: Consistent quality, plus clarity and relevance of research results, were two of the top issues noted by survey respondents.

Benefits: In-house staff is able to focus on higher value activities and the information centers can handle more requests with some form of outsourcing.

The future: John made a particularly valuable point with a diagram of a pyramid to illustrate that, due to outsourcing and other trends, corporate information professional work is likely to revolve around three roles:

Information broker (directing research, managing projects, and internal consulting)

Information engineer (KM, architecture, taxonomies, delivery systems)

Information specialist (deep knowledge, highly trained, domain specialist)

Following John, Kevin Manion, Associate Director of Strategic Planning and Information Services at Consumers Union, held the audience's attention with his colorful history of Consumers Union and his description of the information services group. Consumers Union is "an expert, independent nonprofit organization whose mission is to work for a fair, just, and safe marketplace for all consumers and to empower consumers to protect themselves."

Consumers Union publishes the highly respected *Consumer Reports*, of course, with which most in the audience were familiar. Kevin's stories of some of the group's research challenges were fascinating.

As a research organization and a publisher, Consumers Union is an information-intensive environment where the information service staff is highly regarded. Consultants and independent information brokers are occasionally called in to help with special projects and to extend the capabilities of the in-house staff.

The Breakfast was kindly sponsored by Dialog

■ ■ ■ ■ ■

FINANCIAL INSTITUTIONS SECTION

Roger Strouse
Outsell, Inc.

summary from
Kit Harahan

■ Roger Strouse, Vice-President and Lead Analyst of Outsell, Inc., spoke regarding information dynamics in financial services enterprises. He discussed key drivers and disrupters. One of the things Outsell discovered was the change in user profile. Four years ago those seeking information indicated that they did the search themselves. Today this is still the case, but at a reduced percentage. There was also a significant increase in those asking the corporate library for assistance.

Mr. Strouse also discussed major obstacles to getting information. He talked about the information gathering changes impact on purchasing. Another significant aspect of locating information was what Mr. Strouse called the Google factor and Google's entry into new areas like Google Library and Google Scholar.

All of these changes suggest emerging areas for the information professional's expertise. One of the hottest areas is compliance.

He ended his presentation describing the importance of embedded content and how information professionals can play a significant role in our organization's information flow.

Mr. Strouse took questions and was well received by the attendees.

The Breakfast was kindly sponsored by IbisWorld

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Investment Services Section

CHANGES IN INTERNATIONAL ACCOUNTING STANDARDS

Ian Hague,
Canadian Institute of Chartered Accountants
Sylvia James

Tuesday, June 7, 2005

summary by
Rita Ormsby

■ Ian Hague gave a broad overview of the international efforts underway for convergence of international accounting standards, including web sites. Sylvia James spoke more about the information professional's role and challenges in understanding why figures may vary, as well as the need to question and understand the figures that are being presented. Several sets of figures are now required to meet reporting requirements of regulatory agencies of public companies. One question asked gave reference to the political issues behind convergence issues. (Basically, one is whether the U.S. is using too much force.)

The Breakfast was kindly sponsored by Global Reports LLC

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Private Equity Section

INFORMAL BREAKFAST

summary by
Jan Whittington

■ Two presentations were made, one by Cliff Perry, Warburg Pincus on "Where is Private Equity and Venture Capital?" The other session by Jan Whittington, Advent International, was on "The Role of Information Professionals in Private Equity", followed by an interactive discussion.

The Breakfast was kindly sponsored by InfoCurrent

OPEN HOUSES

summary by
Kevin Manion
Secretary B&F Division

■ The B&F Division hosted its annual open houses in Toronto in June. The elegant Royal York Hotel was the perfect backdrop to honor various member segments within our Division. Canadian Members, International Members, New Members and B&F authors and speakers were each honored on a different night. Many attendees especially appreciated that so many B&F board and advisory committee members attended. It was an opportunity for members and non-members alike to express concerns and raise issues about the Division and the Association as a whole but also a time, so rare in our busy schedules, to re-connect with old friends and colleagues, meet new friends and enjoy a laugh over a drink.

The Division is grateful to its sponsors for their continued support of these important and highly attended events. Without vendor support from Ebsco, Factiva, Lexis-Nexis and Reference USA these events would not be possible.

2005 OUTSTANDING ACHIEVEMENT AWARD SPONSORED BY BNA

Cindy LENOX
John Carroll University
2004-05 B&F Awards Committee Chair

■ The 2005 B&F Award for Outstanding Achievement in Business Librarianship, sponsored by BNA, was awarded to Charles (Chuck) Popovich. The annual award was made at the B&F Annual Business and Awards Meeting and Luncheon, on June 8, 2005 in Toronto. Although the B&F Outstanding Achievement Award has existed (with some modification) since 1984, this was the first year that the award was given under the generous sponsorship of BNA, Inc. Representing BNA was Mr. Greg McCaffery, COO and Cami Hedges, Library Relations. Cindy Lenox, Awards Committee Chair, made the announcement, Sylvia James, B&F Chair, presented the framed certificate, and Mr. McCaffery presented the winner with an award check of $2,500.

Charles (Chuck) Popovich is the Head of the Business Library at Ohio State University (centered in Columbus, OH) and, in this position, has many achievements. However, it is as Editor of the *Journal of Business and Finance Librarianship* that specifically earned him the award. For the past eleven years under his editorship, the journal has met its deadlines (not an easy feat) and focused on issues that concern practitioners. In addition, special issues focused on the "hot" topics of distance education, the core business web, and marketing sources. The journal's editorial board that Chuck assembled consisted of many experts in the varied areas of business information. Many of them are also B&F members. Chuck stepped down from the editor position in the summer of 2005. He has also served the B&F Division in the roles of *Bulletin* Editor, Treasurer, Director, and Chair. An interview with him will appear in the next B&F *Bulletin* issue (Winter 2006).

The winner this year was selected by the B&F Awards Committee and came from a field of very worthy nominees. The both geographically and professionally diverse Awards Committee consisted of Roberta (Bobby) Brody (New York), Cindy Hill (Palo Alto), Gail Kiss (Toronto), Rachel Kolsky (UK/Europe) and Cindy Lenox (Cleveland). The Awards Committee also sought nominations for the B&F Distinguished Member Award. That award is for B&F members who are near retirement and honors individuals who have made exemplary contributions to the field of business librarianship throughout the course of their career. The committee received no nominees for that award and thus no award was made. Sylvia James, who thanks the Committee for its work, assumed the position of Chair of the Awards Committee for 2005-2006.

B&F AWARDS 2005/6

The Division has a long history of recognising exceptional achievement amongst our members. As the B&F Board has approved new awards in the past few years, I thought it was worth summarising the Award structure as it stands. It is my pleasure as Past Chair of the Division to oversee all the Awards this year.

There are 5 groups of awards and the B&F Board Member responsible for the awards are indicated in the list below:

B&F Award for Outstanding Achievement in Business Librarianship Sponsored by BNA, Inc.
Sylvia James

B&F Distinguished Member Award
Sylvia James

Centers of Excellence
Hal Kirkwood

International Travel Award
Robert Clarke

Professional & Student Stipends
Awilda Reyes

For more details on each please consult the Awards page of the B&F website at
http://www.slabf.org/division_awards_desc.html

We are hoping to hold a new B&F Awards Reception at the Annual Conference in Baltimore next June. Under the new structure each of the five award recipients would be honoured at the same time.

How can you help identify our exceptional members? It is not too early to be thinking about next year's winners. If you have any suggestions for any of the awards, please contact the appropriate B&F Board Member, or myself.

Thank you for your consideration.

CONTINUING EDUCATION IN TORONTO

Christopher HOEPPNER
DePaul University

■ The Business & Finance Division has successfully arranged and presented continuing education courses for many years. At the Toronto conference in June 2005 a total of six courses were offered. More than 130 B&F members and other conference attendees participated in these courses. These courses were a valuable opportunity to enhance one's conference experience with coverage of a particular topic in greater depth than could be offered in a regular conference program. Watch future issues of the *Bulletin*, the B&F website and listserv and, of course, the conference program for details on B&F's CE offerings at the 2006 conference in Baltimore.

Four of the courses were in-depth presentations on specific areas of business research. Independent consultant Sylvia James has been doing research on private companies throughout the world for many years, noting that "it is day-to-day work for me, so it has always been a pleasure to try and impart my enthusiasm for the task to a wide audience, as so many business information researchers seem to throw up their hands in horror at the ingrained perceived difficulties of looking at private companies outside the comfort zone of their country borders." Sylvia has recently authored a series of articles about the background knowledge needed for successful company research in various regions of the world. She drew on the content of these articles in her course at Toronto to present "a model that might be used to successfully acquire whatever published information is available on any private company wherever it is incorporated."

Ann Cullen (Business Information Librarian, Harvard Business School) brings a varied background to the subject of private equity research. Prior to joining the Baker Library at Harvard, she worked in several major financial services firms, including Warburg Pincus and Credit Suisse First Boston. "While business librarians typically get training in public equity research, private equity remains a mystery for many," Ann noted. "HBS graduates were some of the earliest practitioners in private equity. I have an active partnership with the School's Private Equity Club; over 80 students attended my workshop last fall." The Toronto course covered sources and guidelines for conducting private equity research in the U.S. and elsewhere and included a case study.

Helen Katz (Manager of Research and Information Services, Ontario Ministry of Finance) presented a course on Canadian business research. Helen has taught a business information course at the Faculty of Information Studies, University of Toronto, for more than ten years. "Canada is often seen as a smaller version of the United States," Helen observed. "However, the business information environment is quite different in terms of sources of information and government publishing." The course explored how these differences affect the researcher seeking information on Canadian companies and industries, looking in detail at key sources.

Issues surrounding corporate governance have become increasingly important in recent years. Neil Infield (Manager of Business Information Services, Hermes Pensions Management) has supported a large team focusing on these issues for an institutional fund manager that has been at the forefront of corporate governance matters. Neil's course covered the history of corporate governance, why it has become so important in recent years, and future areas that are likely to become important, such as a company's corporate social responsibilities, including their environmental impact. The course also examined important sources of information in the field and included a case study of a U.S. company.

The remaining two courses examined administrative issues facing professionals in business libraries and information centers. Hal Kirkwood (Associate Management and Economics Librarian, Purdue University) was the instructor for a course on the usability testing of business library websites. In addition to serving as webmaster for the business library at Purdue, Hal brought to this program his experience as team leader of the Purdue University Libraries' web site redesign. "Usability testing of web sites is fast becoming an additional requirement for many information professionals," Hal observed. "The importance of involving users in the design process cannot be underestimated. Many information professionals don't have a solid grounding in the fundamentals of usability testing. This course filled that gap."

Last but certainly not least, the Business & Finance Division offered a new course this year on the most fundamental of questions: why is it important to an organization to have an information center—and how best to justify this need to management? Independent consultant Lesley Robinson has been a frequent presenter on this subject. The course included presentations, practical exercises, feedback sessions, case studies and discussions—all aimed at helping information professionals "make a good business case for the survival and growth of their services."

THE DEADLINE FOR THE SPRING 2006 ISSUE IS MARCH 15

STUDENT STIPEND AWARD

2006

SPECIAL LIBRARIES ASSOCIATION BUSINESS & FINANCE DIVISION

The Special Libraries Association Business & Finance Division is offering student stipend awards to help cover expenses at the 2006 SLA Annual Conference in Baltimore, MD, June 11–14, 2006. The Division will award student stipends and professional grants for a total of up to six $1,200 awards. The conference theme is "**2006—Putting Knowledge to Work®**."

ELIGIBILITY

- Applicants must be enrolled in an accredited graduate level library or information science program during the 2005/06 academic year and be interested in a career in business librarianship.
- The 2006 Baltimore conference must be the first SLA conference attended.
- Applicants should be members of the SLA Business & Finance Division by March 1, 2006 to be eligible. Membership in other divisions will not replace membership in the B&F Division. Be sure to provide enough time for SLA to process your membership and inform them that you need to be a member of B&F by March 1. Students can access an SLA application form at:
  http://www.sla.org/PDFs/formmember.pdf
  and mail it to the address indicated on that form.
- The recipient may not accept a travel award for the 2005 conference from any other SLA Division or Chapter.

APPLICATION PROCEDURES

- Prepare a written statement*, in English, of approximately 500 words on any one of the following three essay topics:
  1. What is the biggest challenge facing the profession?
  2. What skills must the new information professional possess?
  3. What do you hope to gain from the conference?

Note: All essays must incorporate the conference theme. Essays on topic #3 must demonstrate the anticipated benefits of conference attendance to you and should not list what you will do at the conference.

* *If your essay is available on a public Web server, you may submit a URL in lieu of a paper document.*

- Include a letter of recommendation from either a faculty advisor from your institution or an SLA Student Group Faculty Advisor.
- Include a résumé.

POST–AWARD REQUIREMENTS

- Recipients will write a brief article (approximately 500 words) for publication in the Fall 2006 issue of the *Bulletin* on their conference experience.
- Recipients will agree to serve on one of the B&F Committees, Sections or Roundtables, such as the B&F Mentoring Committee or the College & University Business Libraries Section during 2006/2007.

NOTIFICATION

- All applicants will receive notification of award status by mid-April 2006.
- Winners **MUST** attend the B&F Division's Annual Business meeting on June 13, 2006, in Baltimore, to receive their checks.
- Submit the above documents, along with your address, telephone number, e-mail address in Rich Text (RTF) or *Microsoft Word*, by **E-MAIL** no later than March 15, 2006, to: ***areyes@wcupa.edu***

AWILDA REYES
Francis Harvey Green Library
West Chester University
West Chester, PA 19383
610-436-3206
areyes@wcupa.edu

SPECIAL LIBRARIES ASSOCIATION

BUSINESS & FINANCE DIVISION

PROFESSIONAL GRANT AWARD 2006

The Special Libraries Association Business & Finance Division is offering professional grant awards in the amount of $1,200 each to help cover expenses at the SLA Annual Conference in Baltimore, MD, June 11-14, 2006.

The conference theme will be **"2006—Putting Knowledge to Work.®"**

ELIGIBILITY

- *Applicants must have an MLS degree from an accredited library or information science program.*
- *Applicants must be members of the SLA Business & Finance Division since March 1, 2005.*
- *Applicants must demonstrate interest in business librarianship.*
- *First priority will be given to those wishing to attend the SLA Annual Conference.*
- *Unemployed or under funded applicants will get preference (pending review of a quality essay).*
- *Depending on the number of applicants, funding might be considered to those who would use the grant for a developmental initiative in the field of business librarianship. This could include a research project or travel to develop a library in a foreign country.*

APPLICATION PROCEDURES

- *Fill out the application. A copy is included in this issue.*
- *Prepare an essay, in English, of approximately 700 words, detailing the significance of the grant to your professional growth in business librarianship.*
- *Include a current résumé.*

POST—AWARD REQUIREMENTS

- *Recipients receiving the award for conference attendance will write a brief article (approximately 1,000 words) on their conference experience for the Fall 2006* Bulletin.
- *Other recipients will write a longer article (approximately 1,500 to 2,000 words) to be published in the* Bulletin *describing their professional development project. The article should be submitted upon completion of the project or within one year of the project's commencement, as applicable.*
- *Recipients will be asked to consider serving on the Grants and Student Stipends Committee in the future in order to ensure continuity on the committee and enthusiasm for the award program.*

NOTIFICATION

- *All applicants will receive notification of award status by mid-April 2006.*
- *Winners of the award to attend the Conference **MUST** attend the B&F Division's Annual Business Meeting on June 13, 2006, in Baltimore to receive their checks. If an award is given for some sort of development initiative in the field of business librarianship, other arrangements will be made.*

*Submit the above documents in Rich Text (RTF) or Microsoft Word by **E-MAIL**, no later than March 15, 2006 to: **areyes@wcupa.edu***

Awilda Reyes
Francis Harvey Green Library
West Chester University
West Chester, PA 19383
610-436-3206
areyes@wcupa.edu

SPECIAL LIBRARIES ASSOCIATION
Business & Finance Division
Application for 2006 Professional Grant Award

The Special Libraries Association Business & Finance Division is offering professional grant awards to help cover expenses at the 2006 SLA Annual Conference in Baltimore, MD, June 11-14, 2006. The Division will award professional grants and student stipends for a total of up to six $1,200 awards. The conference theme is "**2006—Putting Knowledge to Work**.®"

For details on eligibility and procedures, see the Award Announcement in this issue of the *Bulletin.*

name

title

institution/company

address1

address2

city

state/province • mailcode

phone [a/c:] *fax [a/c:]*

e-mail

MLS received from
- *institution*
- *date*

NOTE: *Depending on the number of applicants, funding might be considered for those who would use the grant for a developmental initiative in the field of business librarianship. This could include a research project or travel to develop a library in a foreign country.*

Funding will only be granted for Conference attendance OR the development project.

Please check below the purpose of your application:

☐ *I am applying to attend the 2006 SLA Annual Conference.*

I am applying for the developmental initiative.
(If you are applying for this, include a proposed budget and a timeline for completion.)

Answer the following two questions if you are applying to attend the 2006 SLA Annual Conference.

- *When was the last time you attended an SLA Conference?* ____________
- *Will you be able to attend this conference if you do not receive this award? (Please answer yes or no.)*
  ☐ YES ☐ NO

Return this application, along with your essay and résumé by **E-MAIL** no later than March 15, 2006, to: **areyes@wcupa.edu**

AWILDA REYES
Francis Harvey Green Library
West Chester University of Pennsylvania
West Chester, PA 19383
610-436-3206
areyes@wcupa.edu

SPECIAL LIBRARIES ASSOCIATION

BUSINESS & FINANCE DIVISION

PROFESSIONAL GRANT APPLICATION

2006

BUSINESS & FINANCE DIVISION CENTERS OF EXCELLENCE AWARD WINNERS ANNOUNCED AT ANNUAL CONFERENCE IN TORONTO

written and edited by
Hal KIRKWOOD
Chair,
Centers of Excellence Awards 2003—2006

with written contributions by
Barbarah FERRY
National Geographic Society
Libraries & Information Services

■ The Business & Finance Division of the Special Libraries Association proudly announced the winner of the fourth annual Centers of Excellence Awards at the SLA Annual Conference in June 2005. The awards recognized quality as a priority for successful management and delivery of information. The presentation of these awards occurred on June 7, 2005. Immediately following the award presentation, the winner spoke about their best practices for which they were recognized. A summary of the winner appears on the following pages.

The awards serve to recognize the best of "best practices" in three categories: Service, Management, and Technology. Any Member of the Business & Finance Division may apply for consideration in any of the three categories. A panel of judges, who are members of the Business & Finance Division, evaluate all entries. The winner in 2005 represented excellence and quality at its highest level.

To apply for the 2006 Business & Finance Division Centers of Excellence Awards, please see the application guidelines elsewhere in this issue of the *Bulletin*. Additional background information on the Centers of Excellence Awards can be found in the Fall 2001 B&F Division *Bulletin*.

Please send your application to:

Hal Kirkwood, Assoc Prof.
504 West State St. - KRAN
Management & Economics Library
Purdue University
West Lafayette, IN 47907
ATTN: COEA

Or by email: **Kirkwood@purdue.edu**

Email is the preferred method of submitting your application.

For further information please contact Hal Kirkwood at:

765/494-2921
Kirkwood@purdue.edu

Applications must be postmarked by February 15, 2006. Re-applying is welcomed!

A distinguished panel of judges will review the entries. The judges' identities will remain anonymous until judging has been completed. Hal Kirkwood is not serving as a judge.

CHANGING HANDS

Starting in 2006 the new chair of the Centers of Excellence Awards will be Leslie Reynolds, Director, Business Library, West Campus, Texas A & M University. She can be reached at LeReynol@lib-gw.tamu.edu

THE 2005 JUDGES

The judges who determined the winner were Kate Randall Haley, Montrese Hamilton, Helen Katz, Susan Klopper, and Robert Murnan.

PARTICIPATE! APPLY!

The Centers of Excellence Awards benefit the division members through:

- Self-evaluation to determine your organization's excellence and quality.
- Sharing best practices—the very best.
- Publicizing and spotlighting the winners through SLA Annual Conference programming devoted to best practices and conducted by winners of the Centers of Excellence Awards.

FREQUENTLY ASKED QUESTIONS

Who is eligible to receive one of these awards?

Any member of the Business & Finance Division may apply. The award is presented to the organization described by the applicant.

The application can take any form, e.g. written report, videotape, photography, and narration. Each award will be presented to specific business information centers, based on a point system administered by the judges who are members of the Business & Finance Division.

Can I send in an application for an organization that I am not affiliated with?

Yes! You can submit an application for an organization that you are familiar with but not affiliated.

What areas of information management are being focused on?

Service—excellence in service, instruction, and support to constituent users.

Management—successful and effective performance in four basic management roles: conceptualizing/planning, organizing, directing/motivating, evaluation/measuring.

Technology—successful, cost-effective and appropriate application of technology.

What are the award criteria?

The application should cover and comment upon all of these criteria for each category; Service, Management, and Technology.

Leadership
Strategic Planning
Customer/User Focus
Information and Analysis
Human Resource Focus
Process Management
Service Results

Details can be found in section 5.2 of the COE Awards Guidelines.

What are the critical dates in the application, consideration, and award process?

Applications are to be postmarked by Feb. 15, 2006.

Consideration will take place between Feb. 15 and Mar. 21, 2006.

Winners will be notified and announcements will be made in May 2006

Presentation of the awards will take place at the SLA Annual Conference June 2006.

What exactly do I send?

Send by either postal or e-mail:

- A one-page Executive Summary declaring which category (Service, Management, Technology) you are applying for along with a concise explanation of your organization's excellence. It is at the discretion of the judges to determine if your application better fits an alternate category.

- An application containing detailed information fulfilling the expectations within the COEA Guidelines. The judges anticipate being presented with relevant measurable outcomes that pertain to the desired COE Award category. The submitted application should very closely follow the components of the Guidelines.

Questions?

HAL KIRKWOOD
Kirkwood@purdue.edu
765-494-2921

Additional information can be found at **www.slabf.org/centers_of_excellence.html**. Also see the awards guidelines elsewhere in this issue of the *Bulletin*.

THE DEADLINE FOR THE WINTER 2006 ISSUE IS DECEMBER 1

CENTERS OF EXCELLENCE AWARD WINNER FOR MANAGEMENT: NATIONAL GEOGRAPHIC SOCIETY LIBRARIES & INFORMATION SERVICES

Barbara FERRY
Susan Fifer CANBY

■ Thank you very much for this very prestigious award, and also for the opportunity to share with our colleagues. The award in management is really a team award, because it takes a great team with everyone putting their best ideas forward to make all of the various management practices work.

NGS's Libraries and Information Services (LIS) staff of 26 serves 1,500 employees and hundreds of contractors in all divisions as well as the public, by appointment. Our main roles include providing editorial and business research services, business records and archival management, product indexing, trends and news filtering & analysis, training, and facilitating knowledge exchange. LIS staff serve in many leadership roles: chairing the Society's Intranet Team, Knowledge Management Group, Trends Analysis Group, National Geographic Learning Systems, Employee Forum, and contributing to other cross-divisional teams.

Our success as a corporate library lies in coordinated planning and aligning our strategic goals with internal Society requirements and strategies, and external legal, technological, and market conditions.

LIS strategies are submitted on a chart that emphasizes our strategic goals as they related to Innovation, Process Improvement, Cost Reduction, and Asset/Resource Management. A separate chart outlines our operational goals.

Determining the Society's needs takes a multi-prong approach. Feedback is essential to ensure our services meet NGS expectations and needs. Participants who take classes and orientations fill out evaluation forms, which are tabulated by the Society's Market Research division and reported back to LIS. In addition, the Society's Market Research division developed impartial, full service surveys to gauge LIS's success. These interactive surveys form a baseline for our future development.

We also scan editorial and marketing calendars for upcoming stories and focus; meet with most divisions at least once per year; read professional literature; attend professional meetings for ideas; examine reference logs for patterns in questions; and examine LIS annual reports and all metrics for trends. We also read the company's Intranet, divisional websites and corporate press releases and listen to staff's comments for trend ideas.

For example, we recently noticed that several staff from different departments were researching future events and upcoming anniversaries for their editorial planning. They were essentially duplicating each other's work. In response, we wrote a successful business case that received funding to build a Future Events database in 2005. These same staff will be able to share their efforts in a central resource, and LIS will manage and seed the database.

As part of our strategic goals, we look for ways to leverage our collections and our knowledge for revenue-producing products. We produce an annual print index and publish that index online for advertising revenue. We took an in-house report we do for our writers to keep current in areas of science and then partnered with our educational group to offer it to thousands of teachers—we are now looking for a sponsor for that product. We also used our knowledge of the Society to create a book called "High Adventure" on the Society's history, which has sold nearly 47,000 copies without advertising. We also advise our Licensing division on home furnishings patterns and materials with Society-related and historical themes.

We knew from Society staff surveys that ever one is pressed for time. In response, we produce targeted products and services to save Society staff time. For example, we installed a federated search engine to search across many internal databases at once; we also produced automated tutorials; we started 20-minute "coffee breaks" to supplement our longer research seminars; and we developed specialized market reports with a website to analyze social and demographic trends.

Managing strategic and operational processes in tandem can be challenging. LIS staff need to divide their time between the day-to-day needs of current services and the development of new products and services for staff. All LIS staff is required to contribute both to the operational and strategic goals during the goal-setting process. For the past two years, LIS has had an "all LIS" goal-setting meeting to discuss and prioritize LIS goals.

Individual annual goals are compiled by December and managers meet individually with their staff each quarter to gauge the progress of goals, or to tweak the goals for the coming three months. Annual evaluations are heavily weighted on the completion of agreed-upon goals. We produce two annual reports—an abbreviated one for senior management with trends information; another more detailed one for our own staff to compare year-over-year progress and for use in spotting future directions and goals.

Unfortunately, good management and good products are not enough. It continues to be essential to "get our message out" to staff through a variety of methods:

- Weekly, monthly reports and annual goals plus pro-active presentations on Library issues to our executive
- An LIS Marketing Team to coordinate marketing efforts and our messages and standards for branding
- Liaison meetings once annually with every division
- Cafeteria "Info" Tables—for new products and launches
- "Talking up" LIS at informal events / elevator talks

The success of LIS management relates to the creativity, knowledge, and flexibility of all our staff. Our LIS team thrives on being integral to the National Geographic mission—supporting exploration, field science, conservation, and learning about our world.

NATIONAL GEOGRAPHIC SOCIETY LIBRARIES & INFORMATION SERVICES
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SPECIAL LIBRARIES ASSOCIATION BUSINESS & FINANCE DIVISION CENTERS OF EXCELLENCE AWARDS • GUIDELINES

1.0 INTRODUCTION. The Business and Finance Division (B&F) of the Special Libraries Association (SLA) has established a group of awards, collectively titled "The SLA Business and Finance Division Centers of Excellence Awards."

This document describes the awards, publishes the goals of B&F in creating the awards, provides background and rationale for the awards, recommends eligibility criteria and suggests guidelines for managing the awards process.

2.0 DESCRIPTION. The SLA Business and Finance Division Centers of Excellence Awards establish quality as a priority for the successful management and delivery of business information and for disseminating best practices in the business information community.

2.1 The SLA B&F Centers of Excellence Awards recognize information centers and their managements for excellence in putting knowledge to work for the benefit of decision-makers in their parent organizations, particularly in reference to best practices.

2.2 The SLA B&F Centers of Excellence Awards provide recipient special libraries, information centers and knowledge organizations with recognition that can be used in their organizations to demonstrate their success in putting knowledge to work.

For the purpose of these awards, those who make this happen are special librarians, defined by SLA as "knowledge professionals who provide focused information and service to a specialized clientele having an impact on their success, mission, and goals."

2.3 The SLA B&F Centers of Excellence Awards are established in three categories: Service, Management and Technology.

2.4 The SLA B&F Centers of Excellence Awards are linked to B&F Division programming. Specifically, SLA members employed in recipient organizations are expected to share information about successful quality strategies and about the benefit derived from implementing these strategies. This requirement can be met by (but is not limited to):

2.4.1 Serving as presenters, instructors and/or seminar/workshop leaders at B&F programs at SLA's annual conference

2.4.2 Authoring articles for SLA publications:

- Business and Finance Division *Bulletin*
- *Information Outlook*

3.0 GOALS. The SLA Business and Finance Division Centers of Excellence Awards have been created to transform the business information community by establishing quality as the essential and critical element in the management and delivery of business information. This larger goal will be achieved as the awards:

3.1 Promote quality as an increasingly important element in the successful management and delivery of information in special libraries, information centers and knowledge organizations.

3.2 Promote understanding of the requirements for excellence in:

- special libraries, information centers and knowledge organizations
- the parent organizations of which they are a part
- the larger business information community
- the larger management community

3.3 Promote sharing of information about successful quality strategies implemented in special libraries, information centers and knowledge organizations, and about the benefit derived from implementing those strategies.

3.4 Recognize special libraries, information centers and knowledge organizations that excel in quality achievement and quality management, some of whose employees are members of the Special Libraries Association Business and Finance Division.

Business & Finance Division
Centers of Excellence Award Guidelines

4.0 **BACKGROUND AND RATIONALE**.

4.1 In the latter part of the 20th century, within the management community, a concerted effort was made to engender an interest in and a commitment to quality. One element of this effort was the establishment of quality awards, defined as "prizes awarded for some aspect of quality performance which has been demonstrated to an organization which normally has no responsibility for the recipient's performance."

While applying for and winning quality awards can be considered an end in itself, the true value of quality awards is in the implementation of the application process. As the organization prepares to apply for the award, the effort requires an evaluation of quality practices and management excellence already in place, or to be put in place. Thus there are no real "losers" in the process; every organization that applies and seriously implements the application process stands to improve performance within its operation.

4.2 Among the most well-known of the quality awards, the Malcolm Baldrige National Quality Award sets standards that are followed by many other quality-focused organizations.

The United States Congress established the award program in 1987 to recognize U.S. organizations for their achievements in quality and business performance and to raise awareness about the importance of quality and performance excellence as a competitive edge. The award is not given for specific products or services. Three awards may be given annually in each of these categories: manufacturing, service, small business and, starting in 1999, education and health care.

While the Baldrige Award and the Baldrige recipients are the very visible centerpiece of the U.S. quality movement, a broader national quality program has evolved around the award and its criteria. A report, *Building on Baldrige: American Quality for the 21st Century*, by the private Council on Competitiveness, said, "More than any other program, the Baldrige Quality Award is responsible for making quality a national priority and disseminating best practices across the United States."

The U.S. Commerce Department's National Institute of Standards and Technology (NIST) manages the Baldrige National Quality Program in close cooperation with the private sector.

In addition to the Baldrige National Quality Award, other important quality awards are in place, although not many of them embrace a global eligibility (which the SLA B&F Centers of Excellence Awards would do, because of SLA's international membership). Among the most notable of these awards are:

- The UK Quality Award, administered by the British Quality Foundation

- The European Quality Awards, administered by the European Foundation for Quality Management

- The Deming Prize, administered by the Union of Japanese Scientists & Engineers

4.3 Within the information services industry, a number of quality awards are presented on a regular basis. In the Special Libraries Association, Factiva presents its SLA *Factiva Leadership Award—21st Century Competencies in Action* annually to an individual member who exemplifies leadership as a special librarian through examples of personal and professional competencies. [The Special Libraries Association has gained considerable international recognition for its "Competencies for Special Librarians of the 21st Century." The Factiva Award is based on these competencies and how they are used in putting knowledge to work in organizations where members are employed.]

The Factiva Award, it should be noted, is presented to an individual or individuals. It is not given to the organizational entity (special library, information center or knowledge center).

4.4 SLA *Smart Information Centers' Circle of Excellence*. About mid-1999, an attempt was made to identify and recognize organizational entities whose managers succeed in achieving excellence. Through SLA's Information Resource Center, the association sought to collect and disseminate information regarding practices and operating procedures, which promote the value of the information center.

The "best practices" database is intended to serve as a reference tool for SLA members in creating an efficient and effective operating mechanism for developing and delivering products and services to their end users. The information collected is expected to be used separately or in aggregate for educational courses, consultation services, articles, public relations, membership opportunities, research, speakers, leadership development, etc. The program has not attracted much participation, but there is interest at the SLA office in raising awareness about the program and seeking wider participation in the future.

5.0 **ELIGIBILITY CRITERIA**. The SLA B&F Centers of Excellence Awards are established in three categories: Service, Management and Technology.

5.1. For each category, performance standards are a framework that can be used to improve overall performance. For the SLA B&F Centers of Excellence Awards, recommended criteria are based in general on standards of performance published in "Competencies for Special Librarians of the 21st Century."

For these awards, the performance standards are adapted for evaluating performance for an organizational entity (a special library, information center or knowledge center) instead of for an individual person. It should be noted, however, that organizational performance success is directly related to the performance of the people who are employed in the special library, information center or knowledge center applying for the award.

Specifically, these performance standards based on the SLA competencies and germane to the SLA B&F Centers of Excellence Awards are:

5.1.1 Service. Special libraries, information centers and knowledge organizations in the business information community have staff who provide specific and measurable services to their constituent users.

- They are committed to service excellence
- They assess information needs and design and market value-added information services and products to meet identified needs
- They continually improve information services in response to changing needs
- They provide excellent instruction and support for library and information service users

5.1.2 Management. Those with management responsibility in special libraries, information centers and knowledge organizations in the business information community are exceptionally well qualified to perform the four basic management roles (conceptualizing and planning, organizing, directing and motivating, and evaluating and measuring).

- They develop and manage convenient, accessible and cost-effective information services that are aligned with the strategic directions of the organization
- They are effective members of the senior management team and consultants to the organization on information issues
- They use appropriate business and management approaches to communicate the importance of information services to senior management
- They seek out challenges and identify new opportunities both inside and outside the library, information center or knowledge center
- They look for partnerships and alliances
- They create an environment of mutual respect and trust

5.1.3 Technology. Those with management responsibility in special libraries, information centers and knowledge organizations in the business information community are technology application leaders who play a key role in developing information policy for the organization. It is their mission to ensure that access to all information resources—from internal records to external databases—is provided in the most strategically effective and cost-effective manner.

• They use appropriate information technology to acquire, organize and disseminate information

• They work closely with organizational management and information customers in planning and determining support for success in utilizing information technology as well as it can be utilized

• They work with other members of the parent organization's information management team to design and evaluate systems for information access that meet user needs

• They work comfortably and effectively in the hybrid world of print and electronic media and provide the best mix of information resources in the most appropriate formats for the environment

• They ensure that contractual, legal and ethical obligations regarding information use are met

• Because the electronic information age provides new opportunities for organizations to produce as well as use information products, they and their staffs take advantage of opportunities to do so

• Given their familiarity with the information marketplace, they are key contributors to the development, marketing and use of information products

5.2 To determine the success of applicant special libraries, information centers and knowledge centers in meeting these performance standards, each of the three awards (Service, Management and Technology) is based upon how the applicant organization is judged against a set of criteria.

The criteria offered here are suggested by the Malcolm Baldrige National Quality Award and are adapted for the business information management community, particularly, as described above, in relation to performance standards published in "Competencies for Special Librarians of the 21st Century":

The Baldrige (and similar) criteria are used by thousands of organizations of all kinds for self-assessment and training, and as a tool to develop performance and business processes. In fact, almost 2 million copies of the documents describing the Baldrige criteria have been distributed since the first edition in 1988, and heavy reproduction and electronic access multiply that number many times.

For many organizations, using the criteria results in better employee relations, higher productivity, greater customer satisfaction, increased market share and improved profitability. According to a report by the Conference Board, "the evidence suggests a long-term link between use of the Baldrige criteria and improved business performance."

For the SLA B&F Centers of Excellence Awards, recommended award criteria are:

1. Leadership—Examines how managers in the applicant special libraries, information centers or knowledge centers guide the organization and how the applicant special library, information center or knowledge center addresses its responsibilities to its identified user group

2. Strategic Planning—Examines how the applicant special library, information center or knowledge center sets strategic directions and how it determines key action plans

3. Customer/User Focus—Examines how the applicant special library, information center or knowledge center determines requirements and expectations of customers and markets

4. Information and Analysis—Examines the management, effective use and analysis of data and information to support key organization processes, and the success of

the performance management system used in the applicant special library, information center or knowledge center

5. Human Resource Focus—Examines how the applicant special library, information center or knowledge center enables its employees to develop their full potential and how the workforce is aligned with the objectives of the applicant special library, information center or knowledge center and its parent organization

6. Process Management—Examines aspects of how key management, delivery and support processes are designed, managed and improved in the management and delivery of information for the applicant special library, information center or knowledge center

7. Service Results — Examines the performance and improvement of the applicant special library, information center or knowledge center in its key service areas: customer satisfaction, financial management, human resources, supplier and partner performance, and operational performance. The category also examines how the applicant special library, information center or knowledge center performs relative to other service organizations which might (or could) provide the same services

5.3 Applicant special libraries, information centers and knowledge centers are judged according to a point system. Appendix A describes a recommended arrangement for assigning points.

6.0 THE AWARDS PROCESS. The SLA B&F Centers of Excellence Awards are an activity of the Business and Finance Division of the Special Libraries Association. Thus, a planning time frame for the awards process is already in place. The association year, beginning with the association's annual meeting in June of each year, provides a schedule that standardizes the work of all association units. The Business and Finance Division can benefit from the association's calendar to organize the awards process according to a schedule that will match other association activities.

6.1 Participants. As soon as possible after the annual meeting, the Chair and/or Board of Directors of the division will appoint the following:
- Awards committee (to administer the awards)
- Panel of judges
- Board of examiners

6.2 Calendar. The calendar for the awards will include the following items:
- Promotion/publicity about the awards
- Announcement seeking awards applicants
- Application deadline
- Review meetings and examiners' visits and/or interviews (see 6.3 below)
- Judges' meetings
- Announcement of winners
- Promotion/publicity about the winners

6.3 Specific elements of the awards process will be:
- Publicize the awards (committee)
- Receive applications (committee)
- Stage 1: Independent review
  — Select for consensus review (committee)
  If no, report to applying organization (committee)
  If yes, move to consensus review
- Stage 2: Consensus review
  — Select for site visit or interview at SLA Winter Meeting (committee and examiners)
    If no, report to applying organization (committee)
    If yes, conduct site visit or interview
- Stage 3: Site visit or interview (examiners)
- Review and recommend winners (examiners and judges)
  — If no, report to applying organizations (committee)
  — If yes, advise finalists (committee)
- Select winners (judges)
- Report winners (committee)
- Arrange publicity (committee)
- Schedule strategic learning contribution of award winners/coordinate presentations, publication of articles, etc. (committee)

Business & Finance Division
Centers of Excellence Award Guidelines

7.0 REFERENCES.

7.1 The American Productivity and Quality Center **http://www.apqc.org**

7.2 Benchmarking: Leveraging Best-Practice Strategies **http://www.apqc.org/free/whitepapers/dispWhitePaper.cfm?ProductID=663**

7.3 Malcolm Baldrige Quality Award **www.quality.nist.gov**

7.4 Malcolm Baldrige Quality Award. Criteria for Performance Excellence **http://www.quality.nist.gov/PDF_files/2001_Business_Criteria.pdf**

7.5 Special Libraries Association. "A Visionary Framework for the Future: SLA's Strategic Plan." *Who's Who in Special Libraries*, 2000-2001 **http://www.sla.org/content/SLA/strategic/slanplan/mission.cfm**

7.6 Factiva Leadership Award - 21st Century Competencies in Action. **http://www.sla.org/content/memberservice/communication/pr/awdindex/sla/index.cfm**

7.7 SLA Smart Information Centers' Circle of Excellence. **http://www.sla.org/content/interactive/knowledge/bestpractice.cfm**

7.8 Institute for Quality Assurance. **http://www.iqa.org/htdocs/quality_centre/d2-5.htm**

7.9 Other important quality awards:

7.9.1 UK Quality Award British Quality Foundation **www.quality-foundation.co.uk**

7.9.2 European Quality Awards
European Foundation for Quality Management **www.efqm.org**

7.9.3 Deming Prize
Union of Japanese Scientists & Engineers
www.juse.or.jp/e-renmei/main-frame.htm

APPENDIX: Recommended Point System for Judging Criteria for the SLA B&F Centers of Excellence Awards

Categories/Items	*Point Values*
1. **Leadership**	**120**
1.1 *Leadership in the applicant special library, information center or knowledge center*	*80*
1.2 *Leadership within the parent organization*	*40*
2. **Strategic Planning**	**85**
2.1 *Strategy development*	*40*
2.2 *Strategy deployment*	*45*
3. **Customer/User Focus**	**85**
3.1 *Customer/user knowledge*	*40*
3.2 *Customer relationships and satisfaction*	*45*
4. **Information and Analysis**	**90**
4.1 *Measurement and analysis of performance within the special library, information center or knowledge center*	*50*
4.2 *Information management**	*40*
5 **Human Resource Focus**	**85**
5.1 *Work systems*	*35*
5.2 *Employee education, training and development*	*25*
5.3 *Employee well-being and satisfaction*	*25*
6 **Process Management**	**85**
6.1 *Service processes*	*45*
6.2 *Management/professional processes*	*25*
6.3 *Support processes*	*15*
7 **Service Results**	**450**
7.1 *Customer-focused results*	*250*
7.2 *Human resource results*	*80*
7.3 *Special library, information center or knowledge center effectiveness results*	*120*
Total Points	**1,000**

* that is, the management of information relating to the management of the special library, information center or knowledge center (not information management as the mission of the special library, information center, or knowledge center)

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SYLVIA JAMES
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CAREERS, JOBS, RECRUITMENT & LIFE IN THE BUSINESS & FINANCE WORLD

This is the eighth in a series of articles on job hunting and career development aimed at business and finance information professionals.

■ That ugly word, ageism, seems to have haunted me since I wrote the last column on careers. Firstly, an e-mail that went out on the SLA Leadership list from Wei Wei and Montrose Hamilton on May 10, 2005. It was about an article in *Fortune* that was very disturbing and yet fascinating. It crystallised some of the reasons why you might find yourself needing to plan a new independent career in business and finance information work and confirmed more than ever that a new approach to career planning needed. It even gave a new management jargon name to a type of independent consultancy that was forced on some professionals coming up for retirement; “involuntary entrepreneurship”:

The e-mail read as follows:
“The May 16, 2005 issue of *Fortune* has an interesting article on

the difficulty of keeping or getting a job after age 50. The article also describes how some people are creating new career/income paths through "involuntary entrepreneurship". There's also brief discussion of an expected labor shortage when baby boomers move into retirement. [The diversity breakfast in Toronto went into some detail about these same demographic trends within the information profession.]" A section that reverberated with me was: "…'The company would take care of you; all you had to do was work hard '. Forget the paycheck, he tells them. Your W-2 days are over. It's a 1099 world now.'"

See
http://www.fortune.com/fortune/careers/articles/0,15114,1056189,00.html

In addition to the *Fortune* article there were several sessions at the SLA conference in Toronto that looked at career paths for later in life. One of sessions was the Diversity breakfast mentioned in the extract above. This was followed by several conversations I had with friends and colleagues; inside and outside the information profession; about their experiences with this particular retirement crisis. Was it actually happening to them out of the blue?

In the 7 columns I wrote for the *Bulletin* I never directly referred to any particular stage in a career when you might begin working independently. In fact, I have taken the view that it would be best done at the peak of a career, when you have everything to offer prospective clients. You may need to use all your qualifications and experience to dictate what you really want to do with your future working life. Unfortunately, this is not when most people would want to do this. At the peak of your career you are generally in a job that you enjoy and have worked hard to achieve. Family, personal and monetary commitments are often such that you need the stability of this well paid full time and regular work. So, the idea that you might resign and take on a very uncertain life of independent consultancy, just to combine a career and your interests (see Jobs... in BF *Bulletin* 124, Fall 2003) seems laughable. I would argue that this is just the ideal moment to do this, but I know realistically that it is not likely to happen to most people, unless they are forced to think about this route by redundancy at that stage in their career.

So, it would seem the trend is currently for this to happen later in a career. One of the most disturbing aspects is that the announcement seems to be rather unexpected and descends on professionals that are very successful and well respected in their current roles.

What do you do if you are faced with the spectre of "early retirement" disguising redundancy? Can you take up a successful career in business and finance information work as "involuntary entrepreneurship"? Well, all the advice in my previous columns for an independent career holds true for however old are when you need to consider this route. The planning, preparation and dedication to finding work use all of the same methods no matter what age you are when decide to start working independently. However, there are some additional points that should be considered if you are a more seasoned professional.

A common scenario is that by suggesting early retirement, your employer may want you to formally retire and then rejoin the organisation as a consultant. This maybe because you have been working on a particular project or for a specific user group and some continuity is required. The role will stay the same, but a shorter number of days per week are suggested. The retirement actually turns out to be simply an administrative device to reduce the formal headcount and is often the first and easiest choice for an employer amongst the workforce.

The first client in your new independent role may in fact be your former employer. This may indeed be the right route to choose, but there are implications for continuing in the same role only under a different contract. In many countries there is a test for self-employment (usually applied by the income tax authorities) that requires the consultant be totally independent in the sense that they are completely self-directed. This means using to contracts drawn up by the consultant (See Jobs Column 5 BF *Bulletin* 127 Fall 2004) for specific projects over certain time periods. These do not allow for paid vacations, sick leave or other benefits paid for by the client. This is not the spirit of the early retirement model I have described above. The self-employment requirements also often ask independent consultants to demonstrate they have at least 2 distinct clients. I would recommend that anyone who works independently apply these tests of self-direction and several clients, regularly, especially if they are thinking of entering into a large contract with one client. The idea of "retiring" and then continuing in a pre-retirement role as if nothing had changed really is one major contract and certainly does not meet these tests.

Your employer then tries to negotiate a new, post retirement contract with you, based on your previous rate of pay as a full time employee. Resist this suggestion completely. It is not true self-employment and does not take into account the lack of employer funded benefits and overhead involved in working independently. Contracts must be based on a completely different premise and negotiated on an hourly, daily or project rate, not a previous employee salary. Take the time to work out a proper consultancy rate for the work you do (See Jobs Column 6 BF Bulletin 128 Winter 2004). This may be a good time to specify certain aspects of your work that you will only consider from now on, rather than all the duties you performed under an employee contract.

It will also be important to negotiate contacts with specific time periods. This will not be ongoing work like full time employment and entering into timed, detailed contracts will indicate the self-directed nature of the work. Ask for time to prepare an effective proposal and resist any pressure to rush into an unsuitable contract that you may regret later.

My friends who were put in this position recently had very mixed outcomes. Several could not come to any agreement with their employers for a proper contract as an independent consultant and so retired, severing all contact with their previous employer. They are now considering whether to start up independently. It is not easy to go through this process and I would urge caution. Take some time to think through your alternatives, especially if this offer has been a surprise to you. Don't discount any offers from your employer, but be careful about how they may affect your personal finances, tax status and how long you really want or need to work before complete retirement. Get advice from independent advisers if necessary.

If you do take the independent path, there are many unexpected and positive aspects to working in this way and I hope to cover these in my next column.

SYLVIA JAMES

How
to Write
for Information Outlook

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

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

We welcome proposals for articles of interest to information professionals.

Topics

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

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

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

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

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

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Expanded writers guidelines are at www.sla.org/content/Shop/Information/writingforio/index.cfm.

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We usually respond in a couple of weeks or less.

Editorial Calendar

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

The column at the right lists final deadlines. Authors should allow enough time in advance of the deadline for acceptance of their proposals, writing, editing, and any reworking of the manuscript that may result from editing.

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

Issue	Cover Article	Deadline
December 2005	**Career development** Possible topics: Professional development,gaining expertise in content areas, rsum writing, interview tactics.	Oct. 7, 2005
January 2006	**Web searching** Possible topics: Meta directories, using online search engines, the best sites for various content areas.	Nov. 4, 2005
February 2006	**Managing** Possible topics: Planning, budgeting, supervising a staff, purchasing.	Dec. 2, 2005
March 2006	**Internal Marketing** Possible topics: Using intranets and e-mail, training internal clients,special events, tips for increasing usage, showing return on investment.	Jan. 6, 2006
April 2006	**Competitive intelligence** Possible topics: Ethical approaches, sources of information, analyzing information, adding value.	Feb. 3, 2006
May 2006	**Career development** Possible topics: Professional development, gaining expertise in content areas, rsum writing, interview tactics.	Mar. 3, 2006
June 2006	**Digital information sources** Possible topics: Selection process, RFP writing, maximizing usage.	Apr. 7, 2006
July 2006	**Managing** Possible topics: Planning, budgeting, supervising a staff, purchasing.	May 5, 2006
August 2006	**Knowledge management** Possible topics: KM systems, indexing information, low-budget KM.	Jun 9, 2006
September 2006	**Internal Marketing** Possible topics: Using intranets and e-mail, training internal clients, special events, tips for increasing usage, showing return on investment.	July 7, 2006
October 2006	**Web searching** Possible topics: Meta directories, using online search engines, the best sites for various content areas.	Aug. 11, 2006
November 2006	**Copyright** Possible topics: Global considerations, permissions, new laws and regulations	Sept. 8, 2006
December 2006	**Managing** Possible topics: Planning, budgeting, supervising a staff, purchasing.	Oct. 6, 2006

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INTERVIEW WITH PAM ROLLO

Each issue this column explores issues of importance to the Business & Finance Division. In this issue the authors excerpt an interview with SLA President Pam Rollo that was conducted on September 2, 2005 in New York City at the Science Industry and Business Library of the New York Public Library.

A longer version of this interview will be published at a later date.

■ **Good morning Pam.**

JG/KM: What is the importance of volunteering in SLA for you?

PR: I don't necessarily look at volunteering in SLA as an altruistic issue. I have always felt that my interests in SLA were much more about speaking to the profession. I try to get as many people as possible involved in SLA and I have always wanted them to feel like they had a voice. I have always felt it was terribly important to make sure people didn't think we had clicks and to get as many people as possible into the role of decision makers. That has been one of my major objectives.

JG/KM: You mention the word clique, we've made an effort here in New York to try and attract a lot of younger people to the association and to events—but we've heard this word clique

from some of them before—what do we do about that?

PR: The obligations are on two sides. Young people are very enthusiastic and we need their enthusiasm and energy but they don't always have the experience. They don't necessarily know what they want to do or where they belong. It is up to those of us with more experience in the profession to take the extra time we need to understand them, find out how they can get the best experience and how we can put that person to work.

I was surprised when we started recruiting for the task forces that we didn't get as many young people as I expected. So I started picking up the phone and calling the ones who had volunteered and asking them what their interests were and what they wanted to do.

JG/KM: You mentioned the task forces that you are spearheading, can you tell us a bit about them?

PR: I can't take credit for the task forces. About three years ago, the Board looked at all the surveys that had been done in the previous five years and the issues that came up. We hadn't found the time yet to go back to those issues until now because of things like searching for an Executive Director.

I went back to my notes and I identified five or six things that would really resonate with our community. One of things we realized is that we didn't have any solid data. I hope the task forces will do is provide us with a lot of clean, relevant data and information that we can use.

Janice Lachance, our Executive Director, has really gone out of her way to hire really experienced people to work in the Association. I have a lot of confidence that with the right information they will be able to accomplish great things.

So, of course, one of my goals is to expand membership. We're not in the position right now of being thought leaders - we have to work on that. We have to create opportunities for people, to help them be at the right place at the right time.

JG/KM: We've all heard of organizations shutting down their libraries and staff cuts; what would you say to someone considering a career in our profession?

PR: Well, I've been working in this business for 27 years and I have seen four down cycles. In this latest one, if you worked in financial services, IT or customer service - you were challenged. If someone is interested in being an information professional, librarian, archivist, curator, records manager, they should not let the current economic situation make that decision for them. We are also confronting situations where people are changing careers a lot. Rarely is someone going to be in the same career for 45-50 years. You might pursue a lot of different versions of that career. We will be announcing a new caucus for people in mid-career who are at a stage in their life where they are reflecting on what they want to do next. We'll likely call it the career transition caucus and hopefully it will be approved in October.

I would say anyone who is considering entering our profession - it is a bit like the law or medicine—it is a big old grandiose profession and there are a lot of roles you can investigate—if you want to go academic, public service—GO for it. Our colleagues in the business world have suffered from the economic downturn and—since this is for B&F—one of the things I have found very frustrating in the last five years in corporations—information professionals in many departments embedded in corporations have had a horrible experience based on the lack of leadership in the CEO's office. We have all read about the corporate behavior in the newspapers.

JG/KM: In your role as an educator, it sounds like you would tell your students that whenever the words "knowledge" or "information" appear in a job description they should investigate the opening.

PR: Our former president Ethel Solonen—has been working hard on this—she's done case studies and tracked people. We are having difficulty breaking in—people do not want to take the time to understand what we do. We are going to have to do some serious thinking—we have to stop saying if you don't call yourself a librarian you are somehow disloyal to the profession or on the flip side, if you don't call yourself an information professional you are some kind of prehistoric entity. I think language fails us and we have to start coming up with the right words to explain to people who they are dealing with - so they can make some leaps pretty quickly in understanding what we do.

JG/KM: What you have been saying indicates that you feel librarians and information professionals have to be very pro-active in creating an image for them and the profession.

PR: Those of us who have been around the association for a while have to be proactive in order to provide people within the profession with some role models and inspiration. We have to take responsibility to go out there and create concepts and tools for people entering the profession. We also have to come up with some appropriate language for employers. We need to communicate with people about what we do and what we are about. A new vocabulary has to begin this year.

JG/KM: There's an underlying theme of leadership and responsibility in a lot of what you are saying—tell us a little about how you perceive individual leadership within the profession and within the association but also how you perceive leadership as you enter into your year as president.

PR: Leadership in the association—the message I want to give to our members—take responsibility—figure out what you want to do with your own career and education and don't be bullied or pushed around by other people, it is your decision. One message I like to give people is that you may not be the CEO, but take as wide a role as you can in your own organization.

As president, I have to decide with what level of risk we are most comfortable. I am trying to behave in a way that is familiar but also challenging. With the task forces I am trying to provide the members of our association with the ability to make decisions. I want to get people into place so we can move to the next level.

JG/KM: How do you keep informed about the profession—what do you read online, what do you take time out of your day to read.

PR: Because of my new role I am reading different things than I have for the last 20 years. I'm reading a lot of European publications - our colleagues in Europe are not under the same pressures that we are here in the US. I like to read things by other associations. I read a lot of business periodicals and things on organizational communications. I spend a lot of time reading books on how people who look at us define us. I try to figure out what it is like to be outside looking in.

JG/KM: Pam, thank you for your time today.

KEVIN MANION
JOHN GANLY

BUSINESS & FINANCE MENTORING PROJECT UPDATE

Stephen MARTIN
West Chester University

■ The new Community of Practice (CoP) Mentoring site has been created as a tool to share information among our members. The site is part of a number of services provided by SLA. To use the site you start by going to **www.sla.org**. From there, access the SLA Community and select Communities of Practice. Next, you will want to set up "My Personal Page". Don't be confused if you are asked to reenter your last name and SLA PIN number.

WHY THE CHANGE?

The old adage, 'if it ain't broke, don't fix it' is once again relevant. Access to the Mentoring section was broken. People could not access the page nor obtain information on how it worked. Emails were sent to request a mentor or to volunteer to become a mentor. To find a solution to the problem a few proposals were considered. B&F finally accepted the SLA web page as our best option. Belonging to SLA, the SLA web page provided the most positive features for identity, security, branding, maintenance, continuity, upgrades, etc. The B&F Mentoring CoP also provides many additional features.

WHAT YOU WILL FIND!

This is a launch of an information service to which many are unfamiliar. Like any unfamiliar or new information service, e.g. email platform, Lotus Notes, blogs; time will be needed to develop proficiency with the features. Not all the features are directly relevant to the Mentoring community. Depending on who is participating there is great potential for you to share ideas and information with other members. A great asset of the system is that anyone can add content to the page.

FAQs is the first feature in CoP. Any one can add helpful information to support the mission of the B&F Community. A simple click on a button and you can submit information for the FAQ. New content will be displayed. Do not be dismayed to see the phrase, 'Currently, there are no new FAQs.

Community News about Mentoring or other issues you feel the members would like to learn about can be submitted here. This is something you may have felt interested in sharing with other members of the division.

Community Links allows any member to submit web sites pertinent to mentoring or supporting any other instructional purpose.

Community Resources & Best Practices Allows content to be added related to a specific practice, regarding mentoring or any other instructional purpose. You can even submit documents from a file on your computer.

Community Discussions Here you can develop a series of notes to be viewed or develop any discussion preferences. Again, the focus is on mentoring, thus any number of members can submit information on a given thread, e.g. information discovery from Sarbanes Oxley.

Most Recent Posts will display any current news for the mentoring community.

Other New tools! Enhancements will be discussed here as they become available.

DATES! You can add events of interest to members.

CHAT! You can make arrangement with a peer to set up a chat session. You can do this one-on-one, one-to-many, or many-to-many. Imagine mentoring time for people to come together and discuss issues for their professional development.

CONCLUSION

All of these wonderful features will be useless unless you are encouraged to try them and encourage others in the B&F Division to become a mentor for someone. The B&F Mentor Communities of Practice was put in place to enhance our sharing information and experience with each other. Please try it today!

Thank you.

STEPHEN MARVIN
Chair, Mentoring

2004-2005 GRANTS & STIPENDS RECIPIENTS

Awilda REYES
West Chester University, PA
Grants & Stipends Committee Chair

■ This year the B & F Division presented two professional grant awards and four student stipends at the luncheon meeting held at the SLA annual conference in Toronto, Ontario, Canada. Each of the awards was worth $1,200 and used by the winners to attend the SLA 2005 Annual Conference. All the winners are member of SLA Business & Finance Division.

The student recipients worked as Proctors for the CE courses offered by the division. They also agreed to serve on one of the B & F Committees Roundtables during 2005/06.

The grant winners agreed to serve on the Grants and Stipends Committee in the future to ensure continuity on the committee and enthusiasm for the award program. The committee members for this year were: James Cohler from William Blair & Company, Business Information Center in IL, Hazel Cameron, Western Washington University, WA and Christine Reid, University of Strathclyde, Graduate School of Business, Glasgow. We had the task of evaluating 12 applications for the student stipends and 7 for the professional grants.

Here are the brief articles from the winners, relating their experiences at the SLA annual conference in Toronto.

PROFESSIONAL GRANTS

- **ALEXEY PANCHENKO**
  Free Lance Researcher

■ This year I was a recipient of the SLA Business and Finance Division Professional Award, which allowed me to attend the annual 2005 SLA conference in Toronto, an experience that was extremely valuable in terms of both my professional development and personal experience.

Annual SLA conferences are events worthy of attending regardless of where they are held, but in this particular case, the venue deserves special mention. It had been 10 years since the last annual SLA conference was held outside of the United States. Toronto was a great choice, adding a lot of unique local flavor to attendees' experiences. All of my days during the conference were absolutely saturated, with meetings and presentations. The evenings were filled with open houses and fun vendor events. Fortunately enough, I arrived in Toronto on Friday night, before the conference began, and had a chance to spend some time exploring this multi-ethnic city, combining its British history with today's diversity. Toronto is the main business center of Canada, but has a very different look and feel compared to major metropolises of the United States. It has a more European architectural look and a very cosmopolitan human face; with its restaurants, shops and other businesses representing a great range of overseas cuisines and goods from all corners of the world.

The Opening General Session began the conference and featured an animated presentation by Don Tapscott. Mr. Tapscott is the author of the books that many business librarians remember making news in the 1990s, *Growing Up Digital and The Digital Economy.* His most recent book, *The Naked Corporation: How the Age of Transparency Will Revolutionize Business*, deals with corporate transparency, accountability, and competitive advantages associated with broader access to corporate information. As you may have guessed already (after seeing the word "information" in the previous sentence), Don Tapscott's presentation aimed at pointing out what role information professions would play in a new "naked" corporation.

I also attended, and found to be equally insightful, Gary Hamel's presentation during the Closing General Session of the conference. Dr. Hamel is one of the leading academic authors and business consultants in the area of strategic management, and his book Competing for the Future is an absolute must-read for any MBA student and/or competitive intelligence professional. I was very appreciative of the opportunity to attend a live (and lively) presentation of his work.

One of the most memorable events of the conference was the Business and Finance Division's annual Business Luncheon. It gave me a chance to meet other recipients of Student and Professional Grant awards, visit with some old friends and make new professional contacts among our Division members and, last but not least, publicly thank the Division for choosing me to be a recipient of this year's professional grant award.

Another experience that was quite memorable for me was attending the presentation of Centers

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of Excellence Award. The award takes its inspiration from the Malcolm Baldrige National Quality Awards, which are given annually to U.S. organizations to recognize and promote quality as a critical part of innovation and competitiveness. The Center of Excellence Awards, like the Baldrige Award, recognizes customer driven quality and leadership within the framework of an organization dedicated to the gathering, analysis and dissemination of information within the business community.

This year's recipient in the Management category was National Geographic Society's Libraries and Information Services. After Hal Kirkwood, our Division's President-Elect and Chair of Centers of Excellence Award committee, presented the award to Susan Fifer Canby, Director of National Geographic Society's Library, she gave a very interesting overview of her library's structure and scope of activities. It was a very insightful presentation, which not only shed light on the way National Geographic's library team achieved its current state of excellence, but also allowed me to learn more about the National Geographic Society's activities in general.

It would be impossible, in this limited space, to do justice to all of the quality events and presentations of the conference. However, I would like to mention two more sessions that I found particularly insightful. As in previous years, I very much enjoyed the dynamic and humorous overview of the U.S. economy, stock market and interest rates given by Sam Stovall, S&P's Chief Investment Strategist, at the Business & Finance Division breakfast meeting sponsored by Standard & Poor's. The other presentation worth mentioning was a session called Defining Your Intelligence Requirements: Key Intelligence Topics, featuring Jan Herring, a prominent expert in the area of competitive intelligence.

Part of the value that SLA annual conferences offer to information professionals like me is an opportunity to network not only with colleagues, but also with vendors. I spent a lot of time in the Exhibit Hall, exploring new products and services available from numerous vendor companies, discussing technology, content and pricing issues, and also trying to better understand the issues vendors are facing in today's very competitive information marketplace. The previous major professional event I attended was the Online UK conference in London, last December. It was interesting to see, at the SLA Exhibit Hall in Toronto, the changes that some vendors had made to their products just within the 6-month since the Online UK conference. A lot of these changes are good news, a sign of healthy innovation. But it also presents us with a challenge of constantly struggling to stay on top of the latest developments in our field. However, it is not all work. There is a lot of fun in dealing and hanging out with vendors—anybody who attended the Thomson Scientific/Dialog party at the Canadian Broadcasting Corporation building can confirm that. Or you can see it for yourself at the Information Today's blog for the Toronto conference, **http://www.infotodayblog.com**.

Serving on the boards of the Business & Finance Division and Competitive Intelligence Division are another important part of my activities at the conference. Though these meetings may not rank as high as some presentations in terms of their entertainment quotient, I nevertheless feel that they are very important for shaping the future of our professional organization, and therefore appreciate the opportunity to attend these board meetings and contribute to the process.

I would like to finish my notes from the Toronto Conference with expressing one more time my appreciation to the Business & Finance Division for being selected to receive the 2005 Professional Grant Stipend.

- **JAMES WISER**
  Information Services Librarian
  Pepperdine University, Malibu, CA

■ Perhaps it was the excitement of holding the annual conference in another country, or perhaps it was the clean streets and wonderful hospitality of our Toronto hosts – it certainly wasn't because of the heat and humidity! – this year's conference seemed (to me and to the folks with whom I've spoken) to be an unusually upbeat and optimistic annual conference. As a fairly new member of our profession, I had only attended one other SLA Annual Conference (2003), so my claim is largely anecdotal. However, many attendees remarked to me that this was one of the better SLA conferences of late, and from the exhibit hall to networking receptions to general sessions, everyone seemed to agree that it's a great time to be a special librarian. I am especially grateful that the Business & Finance Division awarded me a professional grant; this conference rejuvenated my excitement to be in our profession.

I arrived in Toronto on Sunday morning, June 5, after taking a red-eye flight from Los Angeles. After checking into my hotel and taking a quick nap, I registered for the conference and attended the exhibit hall as soon as it opened. I was quickly impressed by the conference facility—it was a bright, sunny, wide-open space that was easy to navigate and not at all claustrophobic. After visiting a few vendors (and eating some great food!), I walked a few blocks away to the Elsevier reception at the Hockey Hall of Fame. As a native Southerner, I've never been a huge hockey fan, but chocolate fondue can always make hockey seem a little more exciting!

On Monday the conference really began for me. Don Tapscott's keynote address on transparent organizations made a lot of sense to me (though don't we always know people we "wish could have heard it?") I attempted to visit one of two sessions immediately after the keynote address, but was quickly confronted with perhaps the conference's only large flaw - not enough room space for the attendees. I know conference attendance was up from previous years, and I hope that in the future SLA ensures larger room space for its more popular presenters. On Monday afternoon, I presented the paper I submitted as an SLA contributed paper (no worries on overcrowding - the handful of hearty individuals who attended our session slept nicely, no doubt!) Before I left for Toronto, I emailed my PowerPoint presentation to myself and mounted it on a Pepperdine library server. In my rush to the conference, however, I left my floppy disk at home. No worries, I thought, until I realized five minutes before our session that the computer system in our room had no Internet access. So in my first professional conference presentation I committed a mortal error - I did not have PowerPoint slides with which to bludgeon my audience. On Monday night I enjoyed quick visits to four different receptions - the California Chapters reception, the library school alumni reception (Go IU!), the Wiley Interscience reception, and the Dialog reception at the CBC. Four hours and roughly four hundred pounds later, I retired for the night.

On Tuesday morning I attended the College & University Business Librarians (B&F division) breakfast. This was a conference highlight for me—seated at my table were approximately 12-15 business librarians from around the country, and all of us were under the age of 35. I find that reality especially encouraging—we've all read the literature about our graying profession, but to meet and mingle with so many "newbie" librarians was exciting...so exciting, in fact, we socialized right through Bill Buxton's keynote address afterwards. Tuesday afternoon's Business & Finance Awards Luncheon was a very nice even—again, it was nice to meet the faces for names I've read about for years. Gary Price's presentation was next for me, and as always, I learned enough from him to make my head explode. Afterwards, I attended the CUBL planning session at the B&F Suite.

Realizing then that I had not seen Toronto beyond my hotel and the conference center, I journeyed out on Tuesday evening to Yorkville, one of Toronto's large shopping districts. Yorkville is a lovely part of the city, though the heat and humidity quickly convinced me that walking around the city for the entire evening was a less-than-pleasant option. After grabbing another nap, I met a former colleague for dinner and went back to the hotel to pack for my Wednesday morning flight.

Again, this was only my second SLA Annual Conference, but the conference's mood seemed to me so much more optimistic than our conference two years ago. Two years ago the prevalent mood to many conference sessions seemed to mirror the cliché about how to better rearrange the life boats on the Titanic; perhaps the economy for information professionals has truly turned the corner, for I saw no such hand-wringing this time (or maybe I just selected better sessions to attend and colleagues with whom to socialize!) Or maybe our profession is learning how to better adapt to changes on the information landscape. Whatever the reasons for such an upbeat conference, I am again thankful to the Business & Finance Division for awarding me a grant to participate in such a profoundly rewarding event. My attendance at annual conference reengaged me with the profession at large, and I already cannot wait for next year's conference in Baltimore.

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STUDENT STIPENDS

- **CLAUDIA COHEN**
  Library and Information Science
  San José State University, CA

■ Claudia Cohen is currently a student in the M.L.I.S. program at San Jose State University. She has a B.A. in history and German from the University of California at Santa Barbara. Prior to entering graduate school, Claudia worked as a research assistant in investment banking at Robertson Stephens, Jefferies & Co., and JMP Securities. At JMP Securities, she developed research and publishing department procedures and project-managed the automated report submission system and back-end functionality of the company website. She has also been active in her community, as former Chairwoman and founding board member of San Francisco based Life's Work Center, Inc., a non-profit organization providing counseling programs for people seeking meaningful employment.

I would like to thank the B&F Division for providing me with the opportunity to attend the 2005 SLA Conference in Toronto. This was my first SLA conference. As I read the program, I felt like a kid in a candy store. To get the most out of the conference, I planned my schedule in advance. I quickly listed sessions, CE courses, exhibit visits and open houses that I wanted to intend. In reality only Superwoman could have adhered to my initial schedule, but I stuck to it as best I could.

The conference was a memorable experience on many levels. One of my goals was to leave Toronto with ideas for my summer internship (specifically, I would be setting up a physical and electronic library for the market research department of a large corporation). I achieved this with the help of information professionals I met at the conference. The B&F open houses were an excellent opportunity for me to meet people from all over North America, and many provided me with tips that I could employ at my internship. The solo librarian dinner enabled me to learn about the skills needed for the one person managing the different functions of a library. This was important for me, since I would be on my own in developing the library. Finally, I roamed the exhibit halls, familiarizing myself with products and services ranging from library automation software to business databases for potential use at my internship.

I partook in several sessions simply to learn more about topics of interest. The competitive intelligence sessions were extremely informative, with panelists sharing both their experiences in entering the competitive intelligence field and tips for success. I was intrigued to find out how one librarian started a competitive intelligence research branch in her company's business center. The corporate governance CE struck a particular chord, since I had worked in investment banking when many of the corporate scandals (such as Enron) surfaced. I was curious about subsequent regulatory action and its impact on the industry. I also attended the web usability testing CE course. The instructor provided an excellent overview on the subject, and I partook directly in usability testing. The only downside to the CE courses and sessions were the early morning start times, since attending them meant rising at 3:00am California time. A special thanks goes to the corner coffee shop one block from my hotel!

The opportunity to meet professionals in the field was invaluable. An information professional, working in a corporate business center, told me about her experience transitioning into a competitive intelligence setting. A solo librarian shared with me tips on data tracking and management, which I am currently using in my internship. Vendors, too, were an excellent source of information. I was grateful that the conference had special times dedicated solely to exhibitors, and I took advantage of this opportunity to learn about vendor products and services.

Finally, attending the conference enabled me to explore a unique city. In downtown Toronto I was directly in the hub of a bustling business center—the perfect ambience for the sessions on B&F and competitive intelligence. The convention center and my hotel were only several blocks from the waterfront, and the warm summer evenings were wonderful for strolling along the Toronto Bay harbor. After the conference ended, I enjoyed a boat tour of Toronto Bay and around the islands. There are over 260 houses on these islands. Interesting commuting adventures occur for those residents when the bay freezes in the wintertime. Unable to fathom a commute on an iceboat, I appreciate my San Francisco Bay Area home even more.

My experience at the SLA conference in Toronto will always stay with me. It was a wonderful opportunity and a springboard into my career as information professional. The people I met and everything I learned in wonderful Toronto will remain in my mind for quite some time. Here's to next year in Baltimore!

- **TERENCE FORSYTHE**
  Palmer School of Library and Information Science
  Long Island University, NY

■ "Reports of the demise of Librarianship as a profession have been greatly exaggerated."

This in a nutshell sums up my experience at the 2005 SLA Annual conference in Toronto, Canada. I came to the conference with no pre-conceived notions about what to expect but rather approached it with an open mind. Because of this it ended up being one of the most satisfying learning experiences of my life.

I came to the MLIS program in a rather odd way. I was contemplating pursuing a Master's degree in another field when one of my co-workers at the time suggested to me that I take a look at the program at Long Island University. Needless to say I was not even aware of the existence of such a program but after some investigation found it to be intriguing as it coincided with my lifelong interest in information access and retrieval particularly as it relates to Business Information. My reaction was, "But I've been doing this sort of thing all my life". I didn't know that you could get a degree in this area or even that there were job opportunities for persons with these skills. Anyway I applied and was accepted to the program and found that each class I took further stimulated my interest. I then saw the application for the SLA Business & Finance Division Student Stipend Award and after joining the organization as a student member, decided to submit an essay. A few weeks later I was pleasantly surprised to learn that I had been awarded a stipend to attend the SLA Annual Conference. With that I was off to Toronto.

My first conference experience involved my attendance at a presentation on Private Equity Research by Ann Cullen from the Harvard Business School. The information gathered from this four-hour lecture by an experienced information professional was such, that I felt I had received the knowledge-value equivalent to a semester's worth of classes. I also found it inspiring to hear from the other attendees at the seminar, the varied organizational settings in which they worked. This was by no means the traditional setting that most people would imagine for librarians. Immediately I felt as if I was in the right place. The people I met, not just at that seminar but throughout the conference, were very open and friendly and offered me career advice as to the many opportunities in which I could use my degree upon graduation.

The next day I attended another seminar entitled Researching Listed and Private Companies Globally by renowned consultant Sylvia James. It was a fascinating presentation as it exposed me to the approach of information professionals outside the United States as to their evaluation of resources. This again was a very stimulating session as it appealed to my interest in international business sources. As I've said many times to my friends and colleagues, the SLA Conference made a strong argument for the idea of cloning as I wished that I could have split myself up so that I could attend many of the other seminars that were being held simultaneously.

The exhibit hall was an eye-opener for me as I got the opportunity to speak with a lot of the vendors who all had interesting information products on display that they were willing to demonstrate. I was pleased with how welcoming they were by taking the time to speak to a 'Student Member'. It was great to meet representatives from a lot of the products that we use and learn about in school and to see and try out their new product offerings.

Yet another fun-filled event for me was the First-Timers Meeting where I got the chance to meet the SLA Executive members as well as some of the other 600 first time conference attendees such as myself. The organizers had us all play a game that had as its objective the goal of each of us meeting as many people as possible. I thought it was a very clever idea that allowed us to loosen up and have a bit of fun. That's another thing, contrary to the droll stereotype of librarians, SLA members are a fun bunch of people. The meeting also piqued my interest in wanting to become more involved in the organization itself as an active rather than a passive member.

Overall, the SLA Conference confirmed for me the fact that I have made the right choice, not just in pursuing my MLIS degree but also in joining SLA. I look forward to exploring the many different avenues that are now available to me as a result of these decisions. Thanks to SLA in general and the Business & Finance Division in particular, I have found a home. I can't imagine not attending these conferences in the future. I'm hooked for life! Look for me in Baltimore in 2006.

• **DAVID GIBBS**
Department of Information Studies
University of California, Los Angeles, CA

■ I am very grateful to the Business & Finance Division for awarding me a stipend to attend the 2005 SLA Annual Conference in Toronto. Without this support, I would not have been able to attend my first professional conference, which was a truly eye-opening experience.

Things got off to an inauspicious start when I missed my flight from Los Angeles on Friday morning. Fortunately, the Delta agent (surprisingly friendly) was able to get me on a flight leaving just a few hours later, and I arrived in Toronto on Friday evening with plenty of time to get settled and explore the city a bit.

My first "assignment" was Saturday afternoon, when another student attendee and I assisted Ann Cullen of the Harvard Business School at her continuing education course on private equity research. Due to the popularity of the subject and the cancellation of another course, the little room was packed. Ann sent me to make extra copies of the handouts. By the time I found a photocopy machine, figured out how to make double-sided, sorted and stapled copies, and dealt with multiple paper jams (assisted by some very helpful and friendly conference staffers), I had missed the first 45 minutes of Ann's presentation. That may explain my inability to understand much of what followed, but I suspect it would have been over my head anyway. I was impressed by Ann's intimate knowledge of the investing world and her gift for communicating it. I've always known that librarians are under recognized experts in the fields they work in, but Ann set the bar high.

Once the "real" conference got under way on Monday, the energy at the conference center changed dramatically. No longer was I able to just saunter up to a computer to check my e-mail; I had to stand in line! I was all set to go to a session on finding government statistics on the Web, but by the time I arrived it was standing room only. Ditto my next choice, the intriguingly titled "Technology Petting Zoo." A word of advice to first-time attendees: Get to the cool-sounding sessions early!

Fortunately, I ended up at a presentation on creating online tutorials that I hadn't even noticed in the guide. It was a perfect match, since I was helping develop an online tutorial for my internship. Another great session was Gary Price's "The Newest and Best from the One Who Knows." The title may have been less than modest, but Gary didn't disappoint. How he has time to keep up with the breakneck pace of the Web, I'll never know, but I'm thankful he's so generous about sharing his discoveries with the rest of us.

But I think my favorite events at the conference involved food and drink. Tuesday was the Business & Finance Division's annual business meeting and awards lunch, where we travel awardees were generously fed and presented our checks. We were each asked to make a little speech, which I was not at all prepared for, but I think it turned out OK. On Tuesday night I attended my first open houses, and I regret having waited so long. It was a lot of fun hanging out with other conference attendees in a relaxed, informal setting lubricated with hors d'oeuvres and lots of free white wine.

I left my first SLA conference smarter than when I got there, and I'm thrilled to have met so many interesting new colleagues. As a John Waters fan, I'm already looking forward to Baltimore. With any luck, this time I'll be there not as a student but as an actual working information professional.

• **LAURA TUERS**
Department of Information Studies
University of California, Los Angeles, CA

■ The SLA Conference in Toronto was a memorable experience. I arrived Friday evening and spent Saturday visiting friends, registering, and getting my bearings in Toronto. I tried to get a good night's rest Saturday night, as I was proctoring Sylvia James' continuing education course, "Researching Listed and Private

Companies Globally: A Guide and Model" the next morning at the bracing hour of 8:00 AM. Somehow I made it on time, despite a lack of sleep and caffeine! I was certainly glad I did, because I would have hated to miss one minute of Sylvia's excellent (and very popular!) seminar. It was packed full of practical information, recommended sources, and strategies for research and the presentation of the finished research project.

The rest of the conference was a whirlwind of sessions and social events. I tended to gravitate towards the sessions that dealt with emerging technologies and hot new tools-of-the-trade, so I particularly enjoyed Mary Ellen Bates' session on "The Next Information Revolution" and Gary Price's session on "The Newest and the Best from One Who Knows." I came away from both sessions with scribbled URLs and other notes of resources to explore and utilize. For example, Price mentioned a free bibliographic website, RedLightGreen, which I have since recommended to a special library that serves Hollywood costume designers at which I volunteer. They are using RedLightGreen as a source for bibliographic citations as they catalog their collection. As a struggling special library with little corporate support, it was a godsend for them to discover a free helpful source.

Although the sessions were outstanding, the casual get-togethers and chance meetings that permeated the SLA Conference were also valuable. Information professionals are typically generous with their time and expertise, and those that I met in Toronto were no exception. By luck, I was seated next to Doris Helfer, a librarian at CSU Northridge and an SLA Fellow, on the last leg of my flight to Toronto. Doris regaled me with great advice and enthusiastic recommendations, getting me started out on the right foot. Several of the folks at Dialog also took me under their wing and put me at ease. Awilda Reyes was always available at Business & Finance functions with a friendly smile and sage advice on the finer points of the buffet table. I met many different and diverse people during the conference, but the common denominators between them were the enthusiasm they had for the information profession and their generosity in helping newbies like me to navigate the sometimes-overwhelming landscape of an international conference.

I'm already looking forward to my next conference, because I feel like I learned so much that would help me be an even better participant next time. Conference-attendance is an art, not a science, but I think I'm starting to get the hang of it. I hope to see you all in Baltimore!

INTERNATIONAL TRAVEL AWARD

- **VERNON R. TOTANES**

Filipino Librarian in Wonderland

■ I am a licensed librarian from the Philippines, where I finished my master's degree in library and information science just last year. I was able to attend the SLA 2005 Annual Conference in Toronto, Canada, last June 5-8, because I applied for and was given an International Travel Award sponsored by ISI Emerging Markets and administered by SLA's Business and Finance Division. And so, I was pleasantly surprised that I, someone new to the profession with minimal experience, received the award. What follows are some of my notes on the sessions I attended plus a few things that others might find interesting.

Transparency, Technology, Transformation

All the participants gathered for the first time in one venue for the Opening General Session. I was pleasantly surprised to see that there were so many of us—in all sizes, shapes and colors. Don Tapscott, the speaker and author of The Naked Corporation, spoke about the librarian's role in today's should-be-transparent corporations. Memorable quotes: "The problem with librarians is they think they're in the library business" and "If you're going to be naked, you better be buff."

Bill Buxton, technology designer (my term), was the speaker at the General Session on the second day. He started by quoting Melvin Kranzberg ("Technology is neither good nor bad; nor is it neutral") and proceeded to illustrate how technology, if not designed properly, will most likely be bad. He also cited the blackboard as an example of "technology" that works. Why? Because it gets the job done.

At the Closing General Session, Gary Hamel, author of Leading the Revolution, spoke about change and how we're all becoming more ignorant faster. He emphasized the need for innovation and challenged the librarians present to "Move from being custodians of information to catalysts for renewal."

Justifying the Library's Existence

"Making a Business Case for the Information Center: Key Strategies for Business and Financial Libraries" was a continuing education (CE) course and, as such, it should have cost me US$250. But since I was entitled to attend one CE course as part of the award that I received, I got in for free. It was a four-hour course facilitated by Lesley Robinson, the speaker, which centered on what can be done to convince decision-makers that what information professionals do is important. What I found most encouraging was that participants were focused on being proactive and customer-oriented.

"Top 10 Tips," sounded like a good session to attend. What I didn't know was that all the tips had to do with news libraries. But it was good, in a way, because I've always been interested in newspaper operations and some of the tips could, in fact, be applied to just about any library. For example, one tip involved the compilation of a "kudos file," where all compliments and notes of appreciation were filed, which would then be emailed to the community at regular intervals just to show that the library was serving its purpose.

Maximizing the Internet

In "Gary Price—the newest and the best from the one who knows," Gary Price joked that the Invisible Web—which, according to the book he co-authored, "consists of material that general-purpose search engines either cannot or, perhaps more importantly will not include in their collections of Web pages" (The Invisible Web, p. xxii)—has come to refer to any results beyond the first five!

Mary Ellen Bates had a session very similar to the one with Gary Price, but to use an analogy, he was Yahoo! and she was Google. In "60 Tips in 90 Minutes," Bates covered some material that Price already mentioned, but there was also a lot more that was different. And then there were those that she highlighted that complemented what Price discussed.

"Blogging/RSS'ing the Librarian Way" was a standing-room-only session. There were supposed to be three speakers, but Jenny Levine had to cancel because of a family emergency. Marie Kaddell spoke about trends in blogging and RSS, while Catherine Lavallee-Welch focused on the use of blogs for professional development. The latter presentation was the most helpful for me because I never quite looked at blogging as a means for professional development.

Exhibits

There were so many exhibitors at the conference that I decided to just pay more attention to those with smaller booths. I reasoned that the people I wanted to share the information with in the first place would probably already know whatever I might learn from the bigger ones. The following are some of the vendors I thought worth recommending to other librarians:

Evidence Matters will be useful for busy medical professionals or even curious patients. Instead of resorting to keywords, they can use drop-down menus to "assemble" questions such as, "For breast cancer, what is the effect of chemotherapy compared by the outcome rate of survival?" Try the basic free version online.

ISI Emerging Markets was one of the only research companies that I visited with information on the smaller, developing countries in Asia, like Kyrgyzstan. And not just in EMIS, its flagship product, but also in its CEIC databases and its Islamic Finance Information Service. There are free trial subscriptions/online demonstrations available.

Robert A. Schless & Co.'s products were interesting because of how they're accessed by users. Notebooks is a library automation system that allows Lotus Notes users to access their library's catalog without leaving Notes. And, of course, the librarian can manage cataloging, research, serials management and acquisitions from Lotus Notes. View the demo for NOTEbookS online.

Networking

What I really liked about SLA was the fact that I felt so welcome. Whether I was asking questions on listservs or reading online tips about attending the annual conference, the most common advice

I received was to just talk to everyone because SLA members are very friendly.

"SLA First-Timers and Fellows Connect" was a good way to meet other first-timers and more experienced conference-goers, including the SLA leadership. A bingo game was played where first-timers had to get the signatures of members who, for example, had previously been SLA president, owned a dog, or was a twin. I even found myself signing for "My flight to Toronto exceeded 4 hours" and "I speak at least two languages." And because I was one of the first to finish, I actually won a t-shirt!

Career Guidance

There were so many interesting sessions at SLA's annual conference that I wanted to attend but couldn't because of conflicts in schedule or lack of time, but I made sure that I made time for two sessions on career planning. At the "Career Guidance and Mentoring Breakfast," Mandy Baldridge and my fellow attendees gave me an idea of the demand (or lack thereof) for information professionals, while the second allowed me to seek guidance from Marshall Brown, a professional career coach, during a 30-minute, one-on-one session.
University of Toronto Libraries

Of the three University of Toronto (U of T) libraries I visited after the annual conference, it was the Thomas Fisher Rare Book Library that I found most impressive. Among the items I saw during the tour were the small "book" (read: rock) with hieroglyphics, examples of incunabula and illuminated books, and the anatomically correct medical books that had flaps to show what was inside.

Awards

The "Annual Business Meeting & Awards Lunch" of the Business & Finance (B&F) Division was a more formal event than most of the other sessions. It was not just a stage-and-chairs affair; there were about fifteen tables with room for ten people each. And, of course, food was served. I was given a chance to speak when I received my award. I told them I had three things I wanted to say:

Thank you to the Business & Finance Division and ISI Emerging Markets for giving this award for the first time;

Thank you for giving me the award (this got a few laughs); and

Thank you for requiring that applicants write an essay. I posted mine on the Internet and this new kid on the block received good feedback about it from some of the most influential librarians in the Philippines.

Epilogue

"I hope to share what I learn at the 2005 Annual Conference through my blog."

This is what I wrote in the statement I submitted when I applied for the International Travel Award. And I have fulfilled this promise. If you would like to see everything that I wrote about the conference, plus photos and links, please search for "Filipino librarian SLA epilogue" on Google or Yahoo!

http://filipinolibrarian.blogspot.com/2005/07/sla-2005-networking.html

The SLA 2005 Annual Conference was the first library conference I attended anywhere, and I found it memorable, educational and personally fulfilling. I only hope that it will not be the last one I will attend. I actually won a raffle prize at the closing general session—but not before two others forfeited the prize because they were absent. The prize? Free registration for next year's conference in Baltimore! Now all I need is the money for my plane fare...

The author won a free registration certificate for next year's conference in Baltimore from Pam Rollo, SLA president, after the Closing General Session. Right: Ethel Salonen, then-SLA president, signs the author's bingo sheet at "First-Timers and Fellows Connect."

SLA Press Release

SLA PRESS RELEASES
To the SLA Community,

The world's attention is turned to the U.S. Gulf Coast states and the human need left in the wake of the enormous natural disaster there. As many of you return from what in America was the Labor Day holiday, we wanted to update you on what SLA is doing in our sustained response to Hurricane Katrina.

We have been in touch with Louisiana/Southern Mississippi (LaSoMi) Chapter President Lisl Zach, who lives in Baton Rouge, Louisiana, and works for Louisiana State University. Today Lisl sent us this message to share with you:

"I'm still trying to reach the majority of our LaSoMi members. I'm continuing to get undeliverable mail messages from the broadcast message I sent out over the weekend—this tells me that many, many of the organizations in affected areas are without their servers and have not migrated to backup systems.

"My next step was going to be to contact the local chapters in Texas and Florida, where members may have traveled, and ask them if anybody knows where LaSoMi members have ended up. We are obviously first of all concerned about their personal safety and that of their families, and secondarily about the status of their collections.

"I have begun to receive offers of supplies from other libraries and vendors who are willing to mail items such as archival boxes, etc., to me at LSU for distribution when appropriate. These efforts, and the continuing thoughts and prayers of the SLA community, are very important to us here in Louisiana."

SLA WEB LINKS

If you haven't visited our Web site ("www.sla.org") since the hurricane, please do. You will see that we posted info and links to recovery info and resources. From our homepage, you can access a recovery aid agencies list provided by the U.S. government's Federal Emergency Management Agency (FEMA). If you are looking to donate funds toward disaster recovery, you may do so through many aid agencies' Web sites.

DISASTER BLOG

Also through our Web site, you can get to the IPANDA blog. IPANDA is the "Information Professionals' Alliance on Natural Disasters and Accidents," formed after the Southern Asia tsunami. The IPANDAnet Web log has on its site personal offers to provide temporary housing (and other needs) to SLA members and their families or others displaced by Hurricane Katrina. If you would like to offer help, you may post info there. You also may post personal stories or comments, noteworthy tips, and other info. And if you are interested in joining the alliance, you may do so through the blog.

Whether you are an SLA member concerned about those affected by the disaster or someone directly affected, we encourage you to visit the IPANDA blog and use it as a resource to network. The Web address is "slablogger.typepad.com/ipandanet" and emails can be sent to ipanda@sla.org.

UPDATING DISASTER PORTAL

As SLA staff work to stay on top of the disaster and continue to position the Association's resources to respond quickly and effectively to human, professional, and economic need, they have begun updating the Disaster Recovery/Planning Portal. The portal was created in response to the disastrous terrorist attacks of 11 September 2001. It features a host of resources designed to help information professionals plan for or recover from disruptions to the continuity of the information services they provide. The portal can be found at "www.sla.org/content/resources/inforesour/sept11help/disip/index.cfm." Staff expect to complete the update, with general as well as Katrina–specific resources, by the end of next week.

To all of you who have reached out to SLA members and others in the face of the Gulf Coast's recent hardship, thank you. Please continue to share with us what you can do—or tell us what you have been doing—to help your fellows and others affected by Hurricane Katrina.

To those of you directly affected by this horrific disaster, please know that the family of SLA members and the global community of information professionals have you in their thoughts and prayers. We want to help if we can. Please feel free to contact us to let us know what we can do.

Sincerely,
Dav Robertson, Chair, SLA Task Force on Natural Disasters (**robert11@niehs.nih.gov**)
Janice Lachance, Executive Director, SLA (**jlachance@sla.org**)

Resources:
IPANDA blog .... **ipanda@sla.org** or **slablogger.typepad.com/ipandanet**
SLA Global Headquarters .... **communications@sla.org**, **membership@sla.org**, **info@sla.org** or 703.647.4900 (Monday–Friday, press 9 for a staff/office directory)
SLA Web site .... **www.sla.org**

■

SLA Press Release 2005–18

FORMER SLA PRESIDENT
FRANK SPAULDING DIES
Convened Task Force on Value of Information Professional

Alexandria, Virginia, USA, 26 July 2005 — Former Special Libraries Association (SLA) President Frank H. Spaulding died Sunday, 24 July, in Fort Myers, Florida, at the age of 73. Funeral services will be held 28 July in South River, New Jersey.

Spaulding served as SLA president from 1986 to 1987 and created the President's Task Force on the Value of the Information Professional.

"The task force is notable in SLA's long history," said Executive Director Janice R. Lachance. "It helped library and information professionals get much–deserved and long–overdue recognition for their key contributions to their employing organizations. All of us join Frank's wife, Eugenia, and his family in honoring his life and mourning his passing."

Among Spaulding's many accolades are his 1995 installation into the SLA Hall of Fame, 1988 SLA President's Award, and 1990 selection as an SLA Fellow. He served two terms on the SLA Board of Directors between 1982 and 1988; served as New Jersey Chapter President from 1977 to 1978; and he convened the Retired Members Caucus in 2003.

"It was a satisfying and enjoyable 20 years for me being actively involved in SLA (and other information organizations)," Spaulding noted in his SLA memoir. "I remember every event, activity and the members who greatly enriched my professional and personal life."

Spaulding was also active in the American Society for Information Science, American Library Association, and other professional organizations.

Contributions:

Hope Hospice
9470 HealthPark Circle
Fort Myers, Florida 33908
800.835.1673 (USA toll–free)
hopehospice.org

Ss. Peter and Paul Russian
Orthodox Church Cemetery
Perpetual Care Fund

American Cancer Society
cancer.org

■

SLA Press Release 2005–17

CONTACT: Karen Santos Freeman
703.647.4917
kfreeman@sla.org

SLA SALUTES
MAJOR CONFERENCE PARTNERS

Alexandria, Virginia, USA, 27 June 2005 – More than a dozen information and knowledge management companies contributed financially to the success of the recent Special Libraries Association (SLA) Annual Conference in Toronto. Of these, four firms' gifts put them in the top tier of support, earning the distinction of Major Conference Partner.

SLA honors the 2005 Major Conference Partners—LexisNexis, Factiva, Dialog, and Springer. Each contributed $25,000 or more toward the conference and sponsored five or more conference events.

"These outstanding companies are true strategic partners for SLA and the library and information profession," said Ethel M. Salonen, 2004–2005 SLA president. "Without their generous support, the annual conference would not have been the tremendous success that it was."

Almost 5,300 people participated in the conference in early June. At the SLA Awards Ceremony, Salonen presented each company's representative with an engraved crystal vase as a token of appreciation for their significant support.

LexisNexis sponsorships included Monday's General Session Keynote Speaker Don Tapscott, author of the new book The Naked Corporation and the business strategist widely credited with coining the term "paradigm shift." LexisNexis also sponsored SLA President's Showcase Speaker Dan Pink, author of the new book A Whole New Mind; the annual Innovations in Technology Award; the Awards Ceremony and Reception; the Leadership Reception; and many other events.

Factiva's generous contributions included Wednesday's General Session Keynote Speaker Gary Hamel, one of the world's most influential business strategists and author of the best–selling business book of all time, Competing for the Future. Factiva also sponsored the registration function of the conference; TechZone; the Awards Ceremony and Reception; the annual Factiva Leadership Award; and a number of other programs and activities.

Dialog's funding included Tuesday's General Session Keynote Speaker Bill Buxton, an international authority on the relationship between creativity and technology. Dialog also sponsored the Leadership Development Institute, Continuing Education courses, and a host of other events. Springer provided a number of sponsorships including an INFO–EXPO Coffee Break and the annual SLA Professional Award.

SLA BUSINESS & FINANCE DIVISION TREASURER'S REPORT

Terri BROOKS
Investment Company Institute

As presented at the 2005 Annual Business Meeting, June 7, 2005

■ The balances in our accounts, as of June 7, 2005, are as follows:

Operating Account, Wachovia Bank	$22,203.97
Money Market Savings Account, Wachovia Bank	2,685.69
SLA Pooled Fund Account	27,739.93
TOTAL	$52,629.59

There are several factors that these balances do not reflect:

- We anticipate receiving in excess of $45,000 from our generous Toronto Conference sponsors. $22,000 of that amount is not included in the above total.
- It is estimated that our 6 CE Courses this year will bring in over $35,000. Of that we will realize a profit of an estimated $13,000.
- We have already paid $22,000 in Toronto Conference expenses, and that is reflected in the above total. We have budgeted for and have committed to an additional $50,000 in Conference expenses.
- The net effect of these income sources and Conference expenses will leave us with a higher than required surplus in our Operating Account.
- Those of you who attended this meeting last year may recall that I informed you of our cash flow challenges at that time, and the need to transfer $20,000 from our SLA Pooled Fund Account into our Operating Account. Now, with the anticipated surplus, I will be transferring $10,000 back into the Pooled Fund as soon as possible, and will monitor the balance to transfer additional amounts as is practical, in order to realize more Interest Income.
- Please join me in thanking the members of the Executive Board and Advisory Board who have worked diligently this year to continue the tradition of keeping our Division fiscally sound.

SLA BUSINESS & FINANCE DIVISION ANNUAL FINANCIAL STATEMENT JAN 1–DEC 31, 2004

Terri BROOKS
Investment Company Institute

Submitted on March 11, 2005 by Terri Brooks, Treasurer. Corrected Fall 2005.

TOTAL FUNDS AVAILABLE–ALL ACCOUNTS (JANUARY 1, 2004) **$63,318.86**

CHECKING ACCOUNT, WACHOVIA

Opening Balance (January 1, 2004)			$13,775.08	
Income	$66,112.91			
Transfer from Savings, Wachovia	$6,000.00			
Transfer from SLA Pooled Account	$20,000.00			
Total Income		$92,112.91		
Expenses	$86,470.47			
Transfer to Savings, Wachovia	$5,700.00			
Total Expenses		$92,170.47		
Balance of Annual Transactions			($57.56)	
Closing Balance (December 31, 2004)				$13,717.52

SAVINGS ACCOUNT, WACHOVIA

Opening Balance (January 1, 2004)			$3,007.52	
Income	$14.17			
Transfer from Checking, Wachovia	$5,700.00			
Total Income		$5,714.17		
Expenses	$36.00			
Transfer to Wachovia Operating Account	$6,000.00			
Total Expenses		$6,036.00		
Balance of Annual Transactions			($321.83)	
Closing Balance (December 31, 2004)				$2,685.69

SLA POOLED FUND

Opening Balance (January 1, 2004)			$46,536.26	
Income				
Interest Income	$1,029.37			
Total Income		$1,029.37		
Expenses				
Transfer to Operating Account	$20,000.00			
Total Expenses		$20,000.00		
Balance of Annual Transactions			($18,970.63)	
Closing Balance (December 31, 2004)				$27,565.63

TOTAL FUNDS AVAILABLE–ALL ACCOUNTS (DECEMBER 31, 2004) **$43,968.84**

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