BF BULLETIN

The Newsletter of the Business and Finance Division

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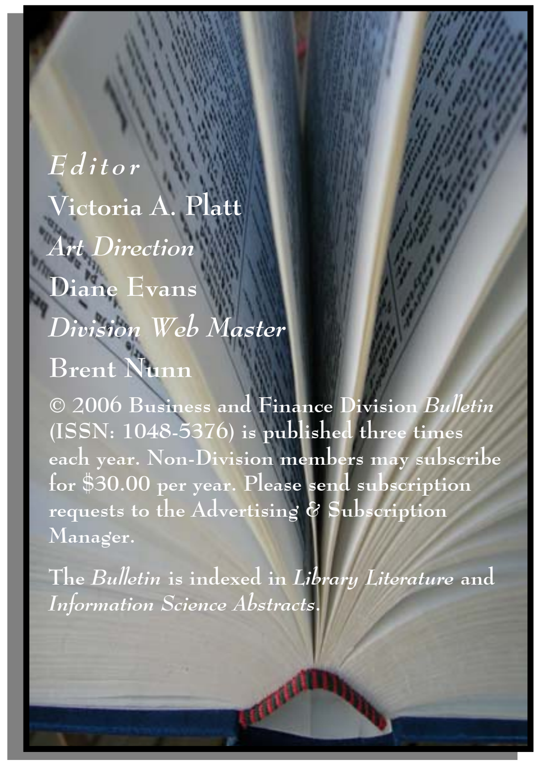

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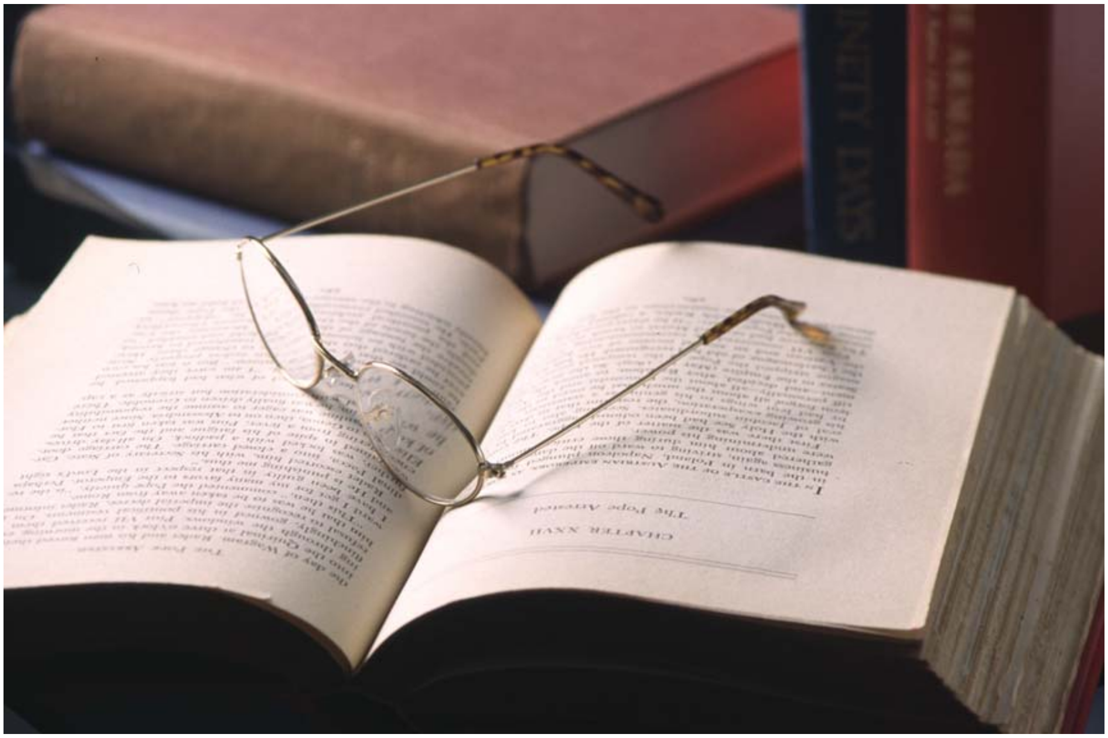

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Instructions to Authors

- ✓ 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.
- ✓ 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.

Copy Deadlines

Winter 2007, Nr. 134: December 1, 2006
Spring 2007, Nr 135: March 15, 2007
Fall 2007, Nr. 136: August 15, 2007

From the Chair *Toby Pearlstein*

LOOKING TOWARD DENVER
WHILE GLANCING IN THE REAR VIEW MIRROR

■ The past 12 months have been a roller coaster ride for me as Chair of the Division. Having had some time now to reflect on the Baltimore Conference I'm feeling both very grateful—to all those who helped the Division put on 4 CE courses, 12 programs and 4 hospitality events—and proud that we could offer such a robust experience for our members and other conference attendees. Elsewhere in this issue you'll see a review of the Division's conference programs. Also, visit our Web site to see many of the presentations that were delivered. If you couldn't be with us in Baltimore this is the next best way to share what was offered.

In addition to conference planning, however, lots of other activities took place during the past year and I want to note just a few of them.

- Publication and e-mail distribution of the first and second edition of the B&F *Bulletin* in electronic form
- Increased funding for the International Travel Award
- Successful implementation of a new vendor relations process for conference sponsorship and *Bulletin* advertising
- A successful campaign by the PR Chair Gayle Gossen to encourage membership to join the listserv *[If you are not a member , please join as we would like to use this platform as an additional communication tool for our members]*
- Appointed a new Web Master
- Reenergized our approach to the Research Resources segment of the Web site including the launch of a wiki to broaden participation in the Resources section
- Relocated the Division archives to Queen's College in New York City where we'll be able to use students in the archives program to help us organize
- Revised and updated the Division Best Practices Manual thereby codifying how we operate—a special thanks to Gayle Gossen for leading this effort
- Published an updated version of the Division Member Author's Bibliography (distributed at the conference and reproduced elsewhere in this issue)—thanks to Cynthia Lesky and Threshold Information for this effort.

Between now and December I'll be finishing my term as Chair and will hand the gavel over to Hal Kirkwood at the Leadership Conference in Reno in January 2007. He is already hard at work planning the Denver conference and much of the programming for that event has already been charted. Hal will need many hands to help make Denver a worthwhile experience, so do get in touch with him if you can help out.

Finally, a big thank you to all those who have made my time as Chair so enjoyable.

While it does take time to be involved in Division activities (and I know we all have decreasing amounts of discretionary time), it is time well spent and is an all-around rewarding experience regardless of where you are in your career.

For those of you who haven't yet gotten your feet wet by volunteering for Division service, I wholeheartedly encourage you to jump in.

Toby Pearlstein
Chair

Editor's Epitome

Victoria A. Platt

In Baltimore an entertaining conversation began during the Division Business Meeting when asked the official name of the *Bulletin*. Amazingly enough there was some debate over the full and proper name of our beloved publication. The title attached to ISSN: 1048-5376 is Business and Finance Division BULLETIN.

Now that we are on our third electronic issue of the *Bulletin* it may be time to consider a new name for our division publication. Maybe something that captures who we are as a division. Maybe something more techno-savvy. Maybe we need no change at all.

Each division is charged with producing a newsletter or bulletin for distribution to their membership. Some other divisions and chapters have fun and interesting titles. A few of those titles are:

Chapter of Division	Bulletin or Newsletter Title
Biomedical and Life Sciences Division	BIOFEEDBACK
Competitive Intelligence Division	INTELLIGENCE INSIGHTS
Engineering Division	SCI-TECH NEWS
Food, Ag., and Nutrition Division	FOOD FOR THOUGHT
Georgia Chapter	PEACH STATE UPDATE
Illinois Chapter	INFORMANT
Information Technology Division	B/ITE
Leadership and Management Division	IMPACT!
Oregon Chapter	E-ORGANIZED LIBRARIAN
Pharmaceutical and Health Tech Div.	CAPLITS
San Francisco Chapter	BAYLINE

After our stimulating conversation in Baltimore the Executive Board voted to consider renaming the *Bulletin*. So, pull out those creative thinking caps and jot down your favorite ideas. Suggestions are officially being accepted for review. Hopefully there will be a number of inspiring names for the Board to review and then present the final name to the Division in Denver.

Please send all suggestions to the editor at vaplatt@willamette.com.

Victoria A. Platt
Editor

BETTER THAN GOOGLE ANSWERS

■ Do you have a virtual, telephone, or in-person reference service in your library? If so, you may find the following article from the Emerald Group very interesting.

Have you used Google Answers (http://answers.google.com/answers) yet? That would be the for-a-fee, human-based service that picks up when your own googling doesn't quite make it. Perhaps you've gotten nothing with your keywords, or your eyeballs are going blank wading through thousands of Web pages.

Google Answers has gathered virtually hundreds of expert researchers who will do the background work so that you can, as it says on its home page, "Ask a question. Set your price. Get your answer." Fast and easy. You can get answers in 24 hours or less to questions such as:

- How do you indicate verb tense in American Sign Language?
- Where can I find a copy of the 1986 Immigration Reform and Control Act (IRCA)?
- I need tables or graphs showing the obesity rate in the U.S. from 1900 to the present.
- How did Post Traumatic Stress Disorder become a recognized condition?
- In Act II, Scene IV of Shakespeare's *Measure for Measure*, what does the term "false prints" mean?

Questions are posted publicly. A researcher who "adopts" a question may e-mail the questioner to clarify what's needed, or simply deliver an answer within a few hours. Google arranges online payment. Although some prices for research such as this go as high as $100 or more, the majority of answers cost no more than a visit to Starbucks. Google Answers say it will not answer homework questions (http://answers.google.com/answers/faq.html), but it acknowledges that it can't always tell whether a question is part of a coursework assignment or not. So, why not pay Google researchers when you get stuck on a question and the deadline is rolling around, like, tomorrow?

Ask a Librarian

For starters, you've already paid for that service, and it's closer than you may think. Reference librarians can provide service equal to what you can get from Google Answers—in fact, some reference librarians we know moonlight as Google Answers researchers. With today's library technology and services, it is just as easy to ask a librarian and get a prompt answer, as to query through Google Answers. You may also get a more context-sensitive answer from an expert who knows your academic institution.

You don't have to walk to the library or pick up a phone to ask a librarian a question. Most likely, you can just pop over to your library Web site and find a link labeled something like Ask a Librarian, Live Help, or, as in the case of Hampshire College, Ask Us Anything! (http://library.hampshire.edu/). In an informal survey of 15 academic libraries and their reference services in April, there were only three instances where we couldn't easily find a link to ask questions, either on their main library page or under tabs such as Services or Help.

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You may have to prove your affiliation with the academic institution whose librarians you are using, either with a library card number or IP-authentication. On the other hand, some institutions' virtual reference service is integrated with a state-wide or consortial service, such as in Florida (http://www.askalibrarian.org/aal.asp) and the Association of Southeastern Research Libraries (http://www.ask-a-librarian.org/), so the service may be open to a broader community.

Virtual Reference

Virtual reference services, as these are commonly called, may be available by e-mail (as Google Answers works), but increasingly, you are able to do live chat or IM when asking a librarian. North Carolina State University (http://www.lib.ncsu.edu/libref/) has a good page showing all their options: phone, live Web service or Instant Messaging, e-mail, or face-to-face consultation.

Virtual reference via the Web is powered by software such as QuestionPoint (http://www.oclc.org/questionpoint/), Docutek's VRL*plus* (http://www.docutek.com/products/vrlplus/index.html), and LivePerson (http://www.liveperson.com/sb/libraries.asp), but the real power behind the answers is library service and reference librarians. For that reason, it's still not a good idea to wait until the last minute. Human librarians, who can provide the expert search help, are not usually on call 24/7. Late evening and weekend questions may not get answered until the next business day. Nevada Virtual Reference (http://vrlplus.cb.docutek.com/lvccld/vrl_entry.asp) offered the broadest hours of coverage of those libraries we checked (Live Chat until 9:00 PM Monday–Thursday, until 6:00 PM Friday–Sunday, although you can leave e-mail 24/7).

Nevertheless, speed and quality of service usually meets and may even exceed what is available on the Net—some of the questions at Google Answers never do get answers. And you don't have to set a price—it's all been taken care of with that tuition check that you or someone who loves you wrote earlier this year.

So the next time you need help cutting through a Web search, using resources beyond the open Internet, or even finding the missing footnote reference for a quote that perfectly sums up your point, don't forget—ask a librarian.

Visit the Business & Finance Division's
Web Site at
www.slabf.org

Making Marketing Materialize

edited by Christine Olson
written by Rita Haydar

FEED THEM, AND THEY WILL COME:
A Solo's Open House Experience

■ This issue Christine Olson provides an article to our *Bulletin* that is full of marketing ideas for information professionals. Based on her electronic newsletter *Marketing Treasures,* volume 15 number 3, we learn about one solo librarian's experience of holding an open house.

Open houses, particularly during National Medical Librarians Month, are a wonderful opportunity for libraries to market their collections and services. But how do you hold such an event when you're a solo, and can't shut down your daily operations to hold the event? Even while providing essential services, it can be a challenge to organize, set up and host an event that includes greeting, answering questions, offering tours, replenishing refreshments, etc. However, as a one-person-library (OPL), I was up for the challenge, as juggling and wearing multiple hats is what we do.

Ever since beginning in my current position at St. Mary Medical Center, I wanted to make my mark on the library. The hospital had been without an on-site professional librarian for approximately three months. My predecessor was charged with both the library and a full plate of CME responsibilities. I inherited a well-located, sunny library that was in a somewhat chaotic phase. Fortunately, the librarian was no longer expected to also run the CME program, and I was able to focus my full attention on the library. After several months of reorganizing, including researching, purchasing and implementing our first integrated library system, figuring out the existing circulation system, meeting the movers, shakers and regular patrons, weeding out a few hundred sorely outdated books and figuring out where to donate them, and establishing a monthly newsletter, I wanted to show off the new medical library at St. Mary. The timing of National Medical Librarians month in October was perfect, as many of my new initiatives would be up and running by then. But how? When? For how long? I wondered how I could pull off such an event without shutting down services while hosting.

In an attempt to glean some ideas from the collective experiences of my colleagues, I sent a message to the MEDLIB-L listserv asking for suggestions on how to accomplish a successful Open House while maintaining a basic level of service. Here are some tips that I found most helpful, and how they played out at my 2005 Library Open House.

1. Recruit hospital volunteers to help. Our hospital is teeming with helping hands, willing and able to help out with any detail in any department. In my case, by prior arrangement, I mainly used volunteers in preparation for the event. At the time, there was no one familiar enough with the library to help with tours or answering questions at the event. Specifically, I had help with manual and clerical tasks such as setting up the refreshments table, creating and putting up signs, and collating pages for the library information packets, and so on. This assistance, and having preparations taken care of ahead of time, was very helpful in not having too much on my plate the morning the event began.

2. Food and prizes are likely to bring people out to the event. It's a fact. Folks will likely make the trek to an event, regardless of

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location, if there is promise of refreshments and a prize or promotional item being given away. Food was at the center of the event, and I was advised by other departments who had hosted celebrations at St. Mary—feed them and they will come!

Some of my vendors donated promotional materials as takeaways (mouse pads, pens and pencils). I ordered promotional sticky notes with the heading “Your Rx for Quality Health Information,” with the hospital logo and library contact information. After all, everyone can use sticky notes; they are useful on any desk or nursing station; and, unlike some items with a limited or single-time use, this promotional message gets seen time after time; as each page gets torn off—there it is again. This has been an excellent promotional tool beyond the Open House. I have used them at health fairs and given them to patrons who go through one-on-one training.

The grand prizes were a free one-hour massage at the hospital’s Holistic Center, a free fitness evaluation, a one-month membership at the hospital gym, and a gift certificate to the hospital gift shop. Certificates for these prizes were packaged in cardboard popcorn boxes along with microwave popcorn bags, sweets and the like.

The event was promoted with flyers sent to all departments, e-mail reminders, and a table in the cafeteria with flyers, signs and balloons. Prizes were awarded from randomly selected entries at the end of the event. The drawing form could only be filled out and submitted at the library. On top of the form was a game requiring a match between a famous person and their quote about libraries. Correct answers were not required to win, but the quotes generated great interest and I received many requests for the correct answers.

3. In a hospital setting, multiple days/times are likely to attract more visitors than a one-time event. Clinical staff has limited opportunities to leave the unit; management personnel have meetings; physicians are always busy. Spreading the event over several days and times can help accommodate more schedules and shifts and encourage higher traffic through the library. My event was held at the end of October, over a three-day period during one week. I held two morning sessions and one afternoon session which covered both day and evening shifts. An early-morning session could have accommodated both the tail end of the night shift and daytime employees. I kept the days adjacent (Tuesday-Wednesday-Thursday) to keep up the momentum of the event.

4. Consider the night shift! The night shift can easily be overlooked at hospital events. Our management makes efforts to include the night shift in all hospital events, festivities included. To accommodate the night shift for the Library Open House, a decorated and ballooned table was set outside the library with nonperishable refreshments, promotional items, prize drawing entries, and informational handouts. Even if your library is closed during these hours, staff on the night shift might still use the library through online resources, e-mail reference, and the like. Some might be taking courses that eventually bring them in to the library during daytime hours. As my night shift prize entries demonstrated, some staff did make the effort of stopping by in those late hours of the night, making this a worthwhile accommodation.

5. Make it fun! It has been my experience that in the minds of many, libraries are restrictively quiet, food-free places where seriousness dominates. It doesn’t hurt to insert some humor into the event. A lighthearted atmosphere is always welcoming.

As an added initiative to reclaim those books that wandered off months (and years) before

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I set foot in my library, I announced Open House week to be Overdues Amnesty Week, with a little gift for any overdue book returned (a bag of sweets since Halloween was approaching), and a larger prize for the person who brought in the most overdue book. Since our library does not fine overdues, and serious approaches in the past did not yield a response, it seemed apt to try for a humorous slant to the problem. Unfortunately, this generated zero responses and I have since given up those books for lost. I am now keeping a strict two-week borrowing period (no fines) and have found that simply reinforcing the due date with each patron and calling all overdue holders has helped tremendously. However, I plan to try the lighthearted approach to overdues again next year.

6. Be flexible. This was my first solo Open House experience. I had an initial plan, which was modified as I got to know my organization's culture and as I thought through the logistics of hosting this event. My initial expectations were altered, and the final outcome of the event differed even from this. As with anything we OPLs do, staying flexible and adapting to the situation are key to making the best of a situation and in planning for the future.

I thought that the formal tour option would not appeal to all attendees, some of whom were on short breaks to attend the event. As an alternative, we had color-copied signs made up identifying each area by name (Reference, Copier, Books, Current Journals, Back Issue Journals, etc.), with a description. This allowed those not interested in a longer, guided tour to walk through at their leisure and still become familiar with the different areas of the library, some of which had been relocated. A sign advertised the new online catalog, which was open on the public PCs to allow people to browse its features. Take-away information included bookmarks with the library's features and contact information, a summary of online resources offered, tip sheets for searching our databases, and recent issues of the library newsletter, among others.

This self-tour option was very popular and allowed me to greet and speak with most visitors individually rather than constantly repeating the tour. Also, it allowed those who wandered in outside of the Open House hours to walk around independently and benefit from the same information. [Note from Chris: Consider taping a tour of the library and offering it as a Quicktime movie on your web site. Make sure you show people using library resources so the library looks "alive".]

What Would I Do Differently Next Time?

- Have a volunteer man the table in the cafeteria advertising the event, perhaps handing out flyers to passers-by.
- There was a wide variety of staff, both clinical and administrative, that attended, though I would have liked to see more physicians attend. Let's go to them! Next year I plan to set up a satellite table in the physicians' lounge also offering refreshments, giveaways and handouts and be there myself at peak times to answer their questions and promote library services.
- Offer an interactive activity that allows attendees to learn more about the library's collections and services. People might take away more information having learned it in a quick guessing game than by reading about it in handouts. For example, a colleague suggested trivia questions such as the number of ILLs filled in a year, strangest or most obscure reference questions, or the names of institutions with whom we collaborate through ILL or other partnerships.
- As I reflect on the event, new ideas continue to cross my mind, and I am keeping a log of them for reference next fall, when I plan my next, new and improved Open House.

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As professionals managing solo libraries, it is easy for us to become so busy in our libraries and become isolated from networking and brainstorming opportunities. Though we work alone, we are not alone in our experiences. Many thanks go out to all colleagues who took the time to share their National Medical Librarians Month experiences with others in the MEDLIB-L audience.

Rita Haydar is the Library Manager at the St. Mary Medical Center in Langhorne, Pennsylvania, USA. She can be reached at: rhaydar at che-east.org.

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Give Yourself Some Credit

The Annual Bibliography of Business & Finance Division Authors recognizes Division members who contribute to the development of the profession by authoring articles, books, blogs with a professional interest, or other substantive publications.

All B&F Division members are asked to submit citations for anything you have had published since April 2006 in the literature of information science, business or any other professional area.

Please use the bibliography published in the Spring 2006 issue of the Bulletin *as a style guide.*

Give yourself some credit! Send your citations, or those of your colleagues, to:
opendoors@threshinfo.com

Cynthia Lesky of Threshold Information Inc. is Chair of the Publications Committee.

From time-to-time *Out of the Box* articles are published in the *Bulletin* in order to acquaint the B&F Division with the activities of other SLA members. If you wish to recommend any articles for publication in future issues of the *Bulletin*, please contact Vicky Platt, editor.

Out of the Box Ann Sweeney & Nancy Minter

LIBRARIES FOR AFRICA'S STREET CHILDREN

■ SLA member Jane Kinney Meyers spoke at a Social Science Division program in Baltimore ("Unto the Least of These") regarding the Lubuto Library Project (www.lubuto.org). The project is incorporated as a nonprofit organization to bring libraries—and, therefore, basic education and literacy skills—to sub-Saharan African street children, most of them orphaned as a result of HIV/AIDS. Construction on the first Lubuto Library in Lusaka, Zambia, will be completed by November 2006. The project also aims to educate U.S. students about the plight of their less fortunate African peers and to involve them in the work of the Project.

Special Librarian Jane Kinney Meyers sees it clearly: a network of small, open-access libraries across sub-Saharan Africa providing basic education and literacy skills to as many of the 43 million orphaned and street children as possible. And so, her Lubuto Library Project (www.lubuto.org) was incorporated as a non-profit in January 2005. The first Lubuto Library is slated for completion in November 2006 in Lusaka, Zambia, with two more to follow shortly.

Living and working in Zambia and Malawi for some seven years, Jane witnessed the dire circumstances of these kids firsthand. In Zambia, she became increasingly involved with services to street children offered by the Fountain of Hope, a drop-in shelter in Lusaka. She established a reading program, served on the board, raised funds, and created a library for the children—among her many contributions to the center. But that was not enough.

Most of the 40+ million African orphans are collateral victims of the HIV/AIDS pandemic, and at least 11 million of them have had both parents die of AIDS. In 10 sub-Saharan African countries, more than one in five 14-year-olds are parentless. According to U.S. government and UN estimates, this number will continue to grow due to the high proportion of adults there already living with HIV/AIDS and the difficulties in expanding access to life-prolonging antiretroviral treatment.

While international relief and development agencies and national governments strive diligently to meet the basic needs of food, medical care, and clothing, most of these children cannot attend school and face a lifetime of poverty and despair engendered by a lack of education.

A former World Bank and U.S. AID librarian, Meyers aims to build and staff libraries complete with excellent book collections carefully compiled utilizing the professional expertise and volunteerism of librarians, writers, booksellers, and U.S. schoolchildren.

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Architect's Model of a Lubuto Library in the Style of Traditional Zambian Homesteads: Entry (center), Activities Building (right), Library Reading Room (left)

Construction of first Library, Lusaka, Zambia; Completion Date: November 2006

Lubuto Libraries will afford a safe gathering place and an opportunity for an informal education for orphans, street children, and other vulnerable children. The libraries will hold events with traditional storytellers—giving the children the opportunity to transcribe and help preserve a vanishing oral culture, as well as create their own books. Beyond this, while participating in the Lubuto effort, American students will learn of the plight of their African peers who deal with HIV/AIDS on a personal, daily basis. To this latter end, Lubuto produced a film, *Kids Just Like You*, which is narrated by Julian Bond and made its debut in May 2006.

The Lubuto Project plans to ship the first collection of 5,000 donated books to fill the shelves of its Lusaka library before the end of the year. As of end-July, appeals had raised three quarters of the funds required for construction, with a need for some $15,000 remaining. Every penny donated to the project goes for this purpose, and the project is appealing to you, as people who understand the value of books and reading, to find a way to reach out now to the children in Zambia who need books to nurture their imaginations and hope. Please visit the Lubuto Library Project Web site to contribute.

"Lubuto," in the language of the Bemba people of Zambia and the Democratic Republic of the Congo, means "enlightenment, knowledge, and light."

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Talking Business Information *Cynthia Lenox*

CONVERSATION WITH RACHEL SINGER GORDON

■ Talking Business Information returns this issue with a conversation between Column Editor Cindy Lenox and Division member Rachel Singer Gordon. Rachel is currently a consulting editor with ITI Books, contributor to several newsletters, prolific writer of seven books, and a presenter at library conferences and workshops.

CL: I found some of your publications and I am interested and impressed with your accomplishments, especially given the fairly short time that you have been an information professional. Please briefly describe your career so far.

RSG: Thanks! I earned my MLS in 1996 (working in a couple different public library positions while in school), and then started work as an entry-level reference librarian at a small suburban Chicago library shortly after graduation. At the time, no one was really responsible for technology at my library, so I started unofficially fixing things; loading software, and helping people with computers—figuring that someone had to do it! As we acquired more PCs and our technology infrastructure became more complicated, I became a reference/ computer services librarian in 1998, and then was promoted to head of a newly-created computer services department in 1999.

I remained in that position until my son was born in late 2002, and then decided to drop my hours to part-time, going back to my reference roots. Last spring I left my reference position to pursue freelance opportunities full-time. Over the years that I worked as a librarian, I also wrote for library-related publishers, publishing my first article in 1997 and first book in 2001. Now, I am a consulting editor with ITI Books, write several monthly columns, have published seven books, and give frequent workshops and presentations at library conferences. This allows me the flexibility to stay home with my son (who is now in preschool) and still pursue a career.

CL: You have written articles aimed at new professional librarians who are seeking, or carrying out, their first professional jobs. What in your own experience led you to recognize and meet this need?

RSG: Several things, starting with my own struggles to find an entry-level job in an overcrowded market (which is even worse now than when I started). Back in late 1996, my last library-school class included about three weeks of learning HTML. Since I was job hunting at the time, I decided to create a Web page listing library-related job banks—and, since my classmates kept asking for a copy, I decided to put it online. This eventually turned into LISjobs.com, and, as the site has grown over the years, so has my interest in career development issues. Library schools don't always do a great job in preparing graduates for the realities of the job market or of entry-level positions, so I think that's a gap that others need to fill.

CL: Is the "new generation" of librarians actually different from other professional librarians in ways other than work experience and age?

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RSG: I think that this is an area where it's very easy to over-generalize, which causes a lot of the friction surrounding any discussion of generational differences. It's more productive to look at trends and influences than to stereotype. Age is an issue, though, because of factors like the flattening of hierarchies in many workplaces, the push to recruit a new generation of librarians, and because younger librarians are often conflated with technology—both in their minds and those of their coworkers. Further, I think that generational expectations often differ; there are more opportunities open to younger librarians than in the past.

CL: What contributions to an organization or team do you believe a new professional makes and what are the implications for working with or managing them? What do you mean by "bridge librarians?" I am thinking that many librarians who have many years of work experience do not consider themselves (and perhaps I should say "ourselves") as "traditional" librarians and have not stopped working to make positive change. I am hoping that each generation of librarians can be open to each other. Do you feel that is realistic?

RSG: Any new person has the potential to shake up an organization, regardless of age. As info pros, one of our main responsibilities is to remain open to new ideas and perspectives; otherwise we become unable to serve our customers effectively, deal with changing technology, and adapt to changing patron expectations.

When I wrote about "bridge librarians" (see http://www.libraryjournal.com/article/CA6282625.html), I had in mind GenX librarians, like myself, who often find ourselves in the middle between the larger Boomer and Millennial groups that garner more attention. When I surveyed librarians and library workers for *The NextGen Librarian's Survival Guide*, I found that a lot of GenXers and younger Boomers used terms like "bridge" to describe their role in their own libraries.

Lastly, yes—as I mentioned above, I think that generational stereotypes are unwarranted and lead to friction between different generations in the workplace. Working together effectively requires letting go of defensiveness and recognizing each others' strengths, generational or otherwise. Those who build networks and relationships on multiple levels, with people in different age groups and with different perspectives, are those who are able to work toward positive change.

CL: What opportunities and challenges do you see for the future special and other librarians?

RSG: I think that every type of librarian faces similar challenges in terms of continuing to prove our profession's relevance and meet patrons' changing expectations. With that challenge, though, comes real opportunity to re-envision our profession. I think a lot of exciting work is coming out of the knowledge management field, which is particularly important to special librarians.

CL: You have done a lot of writing and communicating with others via Web logs. Why is such communication important to you? Is it important for all information professionals?

RSG: I find blogs particularly useful in terms of keeping current, dealing with information overload, and assimilating the opinions of leaders in our field. Blogs are only one part of the picture, though; RSS is a fantastic tool, allowing us to keep up with multiple resources in a fraction of the time. I appreciate being able to filter information through sources I trust and receiving it in one place.

Electronic communication is important to all info pros; nothing else matches its currency and interactivity. The particular format, though,

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is less important than the content—maybe you prefer to stick with e-mail lists, maybe wikis are the format for you. I prefer blogs because of their built-in RSS feeds, and because many people I respect write in that medium. What's important is to remain comfortable with the technologies that other professionals and our patrons are using, so that we can keep current and are not left behind.

CL: Another subject that you have written about is the experience of trying to balance family life with a career. Is this experience different or more demanding than it was in the past?

RSG: In some places, yes, because of the continuing pressure to do more with less and because of the blurring of boundaries between our work and personal lives. I don't think, however, that the basic pressures have changed—and I do believe that libraries could do more to enable balance for all of us.

CL: What ideas do you have for balancing home and work life?

RSG: Determine your priorities going in. My first priority is my family, but my second priority is to continue building my career. The right balance will differ for each of us—depending on how you feel about daycare, whether you have aging relatives you need to care for or pursuits you feel passionate about, whether you have small children at home, whether you have family to help you out or whom you need to help out, whether your workplace offers telecommuting or flextime or compressed work schedules. . . . Some workplaces may also offer more flexibility if you just ask—marshal your arguments and statistics, offer to work out a trial period, whatever it takes.

Secondly, watch for that blurring of boundaries. If you're constantly bringing work home, think about why. If you can't go an hour without checking your e-mail, try giving it two, then three. If you find yourself mentally less "present" at home because you're obsessing over work issues, make a point of bringing yourself back to the moment.

Lastly, find sources of support, whether these are friends, e-mail lists and online groups, or family. We can exhaust ourselves trying to do everything, and just knowing that we're not alone in this can be empowering.

Our thanks to Rachel Singer Gordon for her time and insight. Rachel Singer Gordon (rachel@lisjobs.com) is Web master, LISjobs.com, and author of *The Accidental Library Manager* (ITI, 2005).

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On the Job

Sylvia R. M. James

CAREERS, JOBS, RECRUITMENT, & LIFE IN THE BUSINESS & FINANCE WORLD II

■ In the eleventh installment of her discourse in our ever challenging world, Sylvia James once again gives us her advice.

Financing Self Employment

In the ideal world, no one would be advised to set themselves up in their own business, in any sector, without a cushion of funding that was derived from personal savings or from a benign source, such as loans from family or friends. You may also be in the privileged position of receiving a substantial redundancy payment or have begun to draw on a pension income and so have a suitable source of personal financing for your new business.

In setting up in the business information field, this need not be a large fund, as it is a low cost business with few outgoings. Apart from start-up costs, the problem lies in providing a suitable income for the first few months of the business before invoices for the first consultancy projects are paid, or for providing a fund for riding out lean periods where little work in forthcoming. The difficulty in managing day-to-day living expenses (but there are also advantages) when being paid irregularly, in large amounts is one of the biggest differences between being employed and self-employed. The importance of planning for this, when deciding on self-employment, cannot be overestimated.

There may also be larger expenditures when starting a business or expanding, when sufficient ready capital is essential. But, it is not enough to simply have sufficient financing. Knowledge and planning are required to manage well. This will ensure that you can avoid common mistakes like running through capital from substantial personal savings or redundancy payments to prop up a non-earning business or securing the wrong type of financing, miscalculating the amount required and underestimating the cost of borrowing the money.

Borrowing Money

Perhaps the most important issue when setting out to borrow money at any stage of the business, is a business plan, where the funding requirements are shown clearly. If you don't have a business plan, then getting formal funding will be the time to draw one up. The plan will be essential for getting funds from outside sources. All conventional lenders will want to see your plan for both the start-up and growth of your business and will also require that capital be requested and used for very specific needs. You can obtain the best lending terms when you anticipate your needs, which will become evident in drawing up the plan, rather than looking for money when under pressure.

In your business plan you should include information about several aspects of your activities. Firstly, think about the degree of risk your business will bring to the lender, because this will affect financing alternatives and their cost. As far as lenders are concerned they need to understand the financing needs of a business during transitional stages. So you will need to indicate clearly the state of development of the business. As I mentioned above, be very clear what purposes the

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capital will be used for. If you need new computers, or want to take on staff, make sure you say this will be the use of the funds.

It will also be necessary to clearly describe the business information services you supply; this is where I have always found it much easier to describe my business as a management consultancy, whose specialty happens to be business research. Lenders will understand this type of business. Other indicators, such as the state of the market for business information services, will be much harder to describe, but you of all businesspeople will have the knowledge and skills to put a research report together that can impress a lender.

Don't be afraid to indicate if the market looks depressed or stable. It is not only high growth conditions that will attract a lender. All these stages of the economic cycle require different approaches to money needs and sources. If your basic business proposition is sound, a lender will understand this. Businesses that prosper while others are in decline will often receive better funding terms. Is your business information service seasonal or cyclical? Seasonal needs for financing generally are short term. Loans advanced for cyclical industries are designed to support a business through depressed periods, which may mirror you client base.

How strong are your management skills? Management is the most important element assessed by money sources and you may ask how this can be done when you are a one-person business. You will need to demonstrate that you can manage money and in a new business this will probably draw on experience you have had in an employed position.

Try to imagine yourself in the lender's shoes as you put all of these elements into your business plan. What would you want to see if you were lending your hard-earned money into such a venture?

Types of Financing

There are two types of financing you might be able to get: equity and debt financing. When looking for money, you must consider the debt-to-equity ratio of your business. This is defined as the relation between the dollars you've borrowed and dollars you've invested in your business. The more money owners have invested in their business, the easier it is to attract financing.

If your firm has a high ratio of equity to debt, it is generally considered better to seek debt financing. However, if your company has a high proportion of debt to equity, you would be better advised to increase your ownership capital (equity investment) for additional funds. That way you won't be borrowing to the point of jeopardizing the survival of the business.

Most small businesses would use limited equity financing. As with debt financing, additional equity would mainly come from non-professional investors such as friends, relatives, employees, customers, or industry colleagues; offer them a small stake in your business in the form of shares for their funding dollars. The most common source of professional equity funding comes from private equity funds (venture capitalists), which are very unlikely to be interested in investing in very small businesses and so may be ruled out as a source of funding completely. In the UK for the last few years, we have had a popular television program called "Dragons Den," where private equity investors sit with piles of cash next to them as they hear the pitches of small businesses with a succession of money making ideas. It has amazed me how indifferent these investors are to investment ideas from tiny businesses. So having seen this view (albeit for a TV audience), I think any business information service would be very lucky to get anything out of a PE investor and quite frankly I don't think I would even want to try.

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Debt financing is far more likely. In the U.S. this may come from banks, savings and loans, commercial finance companies, and the U.S. Small Business Administration (SBA). Also look for state and local government initiatives, which may have been developed in recent years to encourage the growth of small businesses in your area, in recognition of their positive effects on the economy.

Traditionally, banks have been the major source of small-business funding. Their principle role has been as a short-term lender offering demand loans, lines of credit, and single-purpose loans for machinery and equipment. Banks generally have been reluctant to offer long-term loans to small firms and these may only be possible through the SBA.

One word of caution though; lenders will commonly require as a necessity your personal guarantee in case of default. This is the way the borrower can show an all-encompassing personal interest to give all their attention to the business.

So good luck with funding. And, when you have it, good luck with your plans for using the money.

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From the *InfoToday blog*:

Megachanges 1946–2066

Right after hearing Mary Ellen Bates talk about "change is constant," I heard an excellent B&F Division presentation on Business Intelligence in a Changing World. Daniel Franklin has been editorial director of the prestigious Economist Intelligence Unit (EIU) and editor of the annual publication, "The World in..." He is about to start as the new editor of The Economist *and editor-in-chief of Economist.com. Needless to say, the room was overflowing with eager listeners.*

EIU was born in 1946 and is now celebrating its 60th anniversary, thus the choice of dates for his commentary—60 years back and 60 years forward. Citing a wide range of authoritative sources, he provided statistics, graphs, and facts to illuminate his fascinating look at 10 themes of change during these years. He covered demographics, the world economy, countries, companies, technology, and more. I won't go into details on the 10 since I've been told that the presentation will be posted on the B&F Web site. [Don't miss his fanciful list of the top companies in 2066, like ExxonHydro, MyMcSpace, and GGS (formerly Google Goldman Sachs).]

These are just a few highlights of what he covered. First, the people. Our global population has expanded by more than 150 percent since 1950, rising from 2.55 billion to 6.47 billion. The UN projects 9.08 billion for 2050, and increase of 40 percent from today. In 2006, for the first time in human history, more than half the world's population is urban, rather than rural. The world economy is nearly 10 times bigger in 2006 than 60 years ago. Countries in emerging markets will experience faster growth in the future, but the U.S. will still grow at 3 percent per year and outpace other rich countries. We've also seen great changes in the balance of military power and international crises have actually lessened. "Yes, the world is actually a safer place. There's less really bloody conflicts." We've also experience quite a social revolution—changing work roles for women, single parent households, gay marriage, and more.

He urged the audience to reflect on these 10 themes—these subjects will be driving business in the future. "The past 60 years have seen extraordinary changes, but we'll see even faster changes in the next 60 years. Prepare for a risky ride, but also an exhilarating one."

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Conference Connections *Toby Pearlstein*

BUSINESS & FINANCE DIVISION PROGRAMS
AT SLA'S 97th ANNUAL CONFERENCE
Baltimore, June 9–14, 2006

■ "Where tradition and transformation converge" was the theme of this year's annual conference and over 18 months of planning, including partnering with other Divisions, resulted in B&F delivering a menu of programs that highlighted the importance of recognizing the best of our profession's past and using it to transform our way forward as information professionals.

These months of planning culminated in a wide range of offerings including five CE courses thanks to the hard work of Chris Hoeppner and Miguel Figueroa; four hospitality events thanks to Kevin Manion, the Division Secretary; six unit breakfasts thanks to the Unit Chairs; and nine topical programs including our first ever program aimed at MLS students. Thanks to those who shared ideas, nominated and secured speakers, and helped with getting sponsorship.

In Baltimore we tried a couple of new ways of doing things. With the "Landing your Dream Job" program we wanted to show MLS students and first time job seekers that the B&F Division cares about their careers and can offer them resources to help get started. Through the efforts of Steve Marvin, Steve Kochoff, Zaida Diaz, Ester Gil and others, this program was a huge success and hopefully has helped to show these students the value of B&F membership. A special thanks to Pat Fisher, a student at the University of Maryland, who volunteered to design the marketing flyer for this program which could be seen everywhere around the conference center.

The Awards Cocktail Reception provided a showcase for our grant, stipend, and award winners to be feted by their colleagues and share some of the secrets of their success. The Executive Board wants your feedback about whether or not you felt these events were worthwhile. Likewise, any other ideas you have for programming and ways to make the conference a productive experience both professionally and personally will be most welcome.

From feedback received so far, this year's programs seem to have hit a sweet spot with conference attendees. Not only did we have many standing room only sessions *(not always a good thing but it's very hard in advance to know what will be a popular topic)*; our Division received some very nice comments from speakers and bloggers. We even had our Corporate Information Centers' Section program noted as one of the programming highlights in a *Library Journal* overview article on the conference! Congratulations to all involved.

Topical programs ranged from our ever popular breakfast featuring Sam Stovall the Chief Investment Strategist of Standard & Poor's sharing his view of where the markets are trending; to an overview of copyright in the digital environment; researching subjects who don't want to be researched; a review of doing research in Asian sources especially China; dealing with content provider business models; Leadership to "knowing your client."

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Hospitality Events

Division open houses and cocktail receptions aspire to provide opportunities for us to highlight conference themes, offer venues for networking, and generally, celebrate with colleagues. This year was no different. Great food and libation were enjoyed by the 200 plus folks who joined us at each event and hopefully each took away with them a renewed appreciation for the value of this kind of Division conference programming. Thanks to the generosity of our vendor partners—**Datamonitor** (Saturday night's conference kick off with vendor supplied raffle prizes), **Factiva** (supporting both our MLS student's program and Sunday evening's open house dedicated to students), **Lexis/Nexis** (our Monday evening Awards Reception), and **OneSource** (Tuesday evening featuring the release of our annual Division Member's Bibliography)—all of these events met our aspirations.

Division Awards Reception

Moderated by Sylvia James with Robert Clarke, Awilda Reyes, and Leslie Reynolds. We had a new format for the B&F awards this year. Considering the numerous competing receptions that were held at this time on the Monday evening of Conference, this was a well attended event and a very successful format for our Division awards. It freed up the Annual Luncheon and Business Meeting for more networking (as members requested last year) and celebrated our many awards in a more informal and relaxed setting. It also enabled B&F members to meet and speak to the award winners more easily than at a sit down lunch. Many thanks to **Lexis/Nexis** for their generous sponsorship of this event.

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Rita Ormsby
Outstanding Achievement Award recipient

Susan DiMattia
Distinguished Service Award recipient

Award	Winners and Presenters
Outstanding Achievement Award (sponsored by BNA) Kammie Hedges	Sylvia James presented to Rita Ormsby
Distinguished Member Award (sponsored by Alert Publications and Books Online) Nina Wendt	Terri Brooks presented to Susan DiMattia
International Award (sponsored by ISI) Peter McGale	Bob Clarke presented to Muhammad Shafiq To be presented in Denver 2007
Professional Grants & Student Stipends Awilda Reyes	*Professional Grants Winners* Christina Zeller and Eileen Davenport *Students Stipend Winners* Judith S. Eckoff, Mari Beth, Thomas D. Sullivan, & Rachel E. Watstein
Center of Excellence Award Leslie Reynolds for B&F	Kathy Long for winner J. Hugh Jackson Library Graduate School of Business, Stanford University

Review of Selected Sessions

Members are encouraged to visit the Division Web sites were presentations from many of the sessions have been posted (http://www.slabf.org/)

Landing Your Dream Job

The panel for this program of **Robert Newlen** from LC's Congressional Research Service and author of a book on resume writing (published by Neal-Schuman); **Anne Caputo**, Factiva Director, Knowledge and Learning Programs, and **Susan Fifer Canby**, VP, Libraries and Information Services, National Geographic conducted a highly interactive session with a good flow and interchange between panelists and audience. Panelists gave advice about job hunting, resume, and cover letter preparation, do's and don'ts of interviewing and following-up after interviewing. They even remained after the scheduled program end to answer individual questions. A recruiter was even in the audience announcing job openings (something we had not planned but was a great addition for the attendees). The program was followed by a reception/open house on Sunday evening where Steve Kochoff (who did such an excellent job moderating the panel discussion) asked students to introduce themselves and describe their "dream job." We heard later that this activity resulted in at least one interview offer on the spot! Our thanks again to **Factiva** for sponsoring both the program and open house.

Breakfast with S&P's Chief Investment Strategist Sam Stovall

This now traditional breakfast program saw long-time favorite speaker Sam Stovall give his usual slick professional presentation about investment activity over the last year. The breakfast was well attended and popular as

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ever; with interesting questions from B&F members. Despite the rather awkward buffet service (for a group of over 150 attendees), everyone remained good natured and used the long buffet queue as yet another networking opportunity! Thanks again to **Standard & Poor's** for sponsorship of this event.

Business Intelligence in a Changing World—Division Keynote Address.

Moderator Sylvia James, Sylvia James Consultancy, with speaker Daniel Franklin, *The Economist.*

Megachange 1946–2066: Business Intelligence in a Changing World

Written for us; the first time Franklin had presented this paper; given to a packed room and it was the 60th birthday of the EIU being formed out of "The Economist"; so he gave a 60 years back, 60 years forward projection, which had the whole audience agog. Just like his colleague, Robin Bew, Chief Economist of the EIU for B&F last year, Franklin had a way of making economics intelligible and understandable and above all really interesting! Can't better the description given by Paula Hane (see page 23); just want to add that Franklin has moved on from the EIU to become Managing Editor of *The Economist*.

"Texaco to Tasini to Legg Mason"

Moderator Toby Pearlstein, Bain & Co. with Speaker Laura N. Gasaway, Director of Law Library and Professor of Law, UNC (Chapel Hill). Gasaway, a well-recognized expert on copyright law, took the audience through a review of statutory changes in copyright as well as an overview of leading cases and changing practices of information professionals including the impacts of these decisions on our daily struggles to help our organizations comply with copyright and still serve our customers. Speaking to a packed room where attendees were standing or sitting on the floor, Gasaway outlined many of the questions that remain unanswered about Fair Use and digital rights management as well as touching on why organizations should have a copyright policy and how best to frame one. She also reviewed some of the pending legislative and committee discussions on copyright where she is involved as an expert participant. Despite delivering a load of information, there were still many questions from the audience including issues of international copyright management reinforcing that this topic will not soon be forgotten. Check out her full presentation, which will be available on the Division Web site for a limited time. Thanks to **Copyright Clearance Center** for their sponsorship of this program.

Section Breakfasts

Real Estate Round Table

Moderated by Andrea Harpole, NYU with speaker Bill Garber, Director of Government Affairs, and The Appraisal Institute. The group, including members from The Appraisal Institute, Credit Suisse, MuniMae, and NYU, discussed experiences and issues in real estate information and research, and Bill Garber gave a very interesting presentation on the use of real estate information at The Appraisal Institute. Thanks to **10-K Wizard Technology** for their sponsorship of this program.

Corporate Information Centers Section: "Moving to Client Embedded Services"

Moderated by Cynthia Lesky, Threshold Information with speaker David Shumaker, MITRE Corporation. Dave Shumaker is the Manager of Information Services at the MITRE Corporation. In the 5 years Dave has held his current position, the Information Services department has expanded embedded services paid for by its internal customers from about 2 staff years to about 12 staff years. The focus of his talk was on building and sustaining embedded information services from a management perspective rather than on how to execute services day to day.

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By MITRE's definition, an embedded librarian works exclusively for one client group over an extended time, or may have a small number of major clients. The position is paid for by the client. The Information Center retains 20% of the staff member's time for professional development and team building activities. The program started with the active support of senior management and Dave continued its development by proactively presenting the value of in-group information services to the management of client groups. Consultative selling techniques helped client group managers see the value of having embedded information specialists. He credited the ability to maintain good relationships with customer senior contacts, maintaining close communications with key customers, and delivering on promises with enabling his group to sustain and grow embedded services.

Dave's presentation was warmly received and generated lots of questions from the audience. Thanks to **InfoCurrent and Hemscott, Inc**. for their sponsorship of this program.

CUBL Section: "Trends in Academic Libraries"

Moderator Glenn McGuigan, Penn State Harrisburg with Panelists Louise Klusek (Baruch College CUNY), Peter McKay (Univ. of FL), and Gary White (Schreyer Business Library, Penn State University Park). Three academic business librarians delivered presentations on current topics and trends within the field of academic business librarianship. This section breakfast continues to be extremely popular, selling out early. Thanks to sponsor **ProQuest, Inc.** for making the program possible.

Financial Institutions Section: Moderators Kit Harahan, America's Community Bankers and David McBee, Office of the Comptroller of the Currency. Speaker Jessee Stiller, Special Advisor for Executive Communications, Comptroller of the Currency, gave an overview of banking trends with a historical perspective. He discussed the Comptroller's emphasis on consumer protections and the need for banks to be very diligent in providing proper disclosures and in educating the customer. He talked about trends in branching and technology and how those two areas shape banking activities. Mr. Stiller pointed out even though the financial services industry has consolidated there is still a great deal of interest in establishing new institutions and that applications for new charters are continuing to grow.

Mr. Stiller took questions from the audience on number of topics ranging from preemption to regulation of government sponsored enterprises. Thanks to **SnapData Int'l and FactSet** for their sponsorship.

Private Equity Section: "How Data is Collected"

Moderator Cliff Perry with Daryl Pinto, Director of Global Private Equity Performance at Thomson Financial. This year, the Private Equity breakfast session focused on how Thomson collects data on the industry. Darrell Pinto started the lively and interactive presentation by explaining the various types of players in the industry, which includes Limited Partners (LP), private equity firms and portfolio companies. As the money flows from one entity to another key data point are created. TF collects these data points through various methods including sending quarterly surveys to associations and other third parties, performing quarterly analysis of General Partners (GP) and their investor's financial statements as well as daily research through public sources and government filings. According to Darrel Pinto, what differentiates TF from some of their competitors is their global reach, exclusive venture capital association relationships and their benchmarking (IRR) tools. Examples were given to illustrate the types of questions their database could answer such as:

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- How have life science VC funds performed in the U.S. versus Europe?
- How does Canada rank globally in terms of venture capital activity?
- How does private equity fundraising last year compare to previous years?
- Do VC-backed companies that have gone public fared better compared to other public companies?

A further discussion ensued regarding the calculation of returns. Due to the Freedom of Information Act (FOIA), public pension funds have to provide GP IRR data; however, one cannot assume every GP calculates returns in the same matter. TF asks for the underlying cash flows so they can calculate the returns. This methodology allows one to compare returns across funds on an apple to apples basis. The session concluded with a brief Q&A discussion. Thanks to **Thomson Financial** for their sponsorship of this event.

Investor Services Section: "Getting to Know Your Clients"

Moderator Rita Ormsby, Newman Library, Baruch College with speakers Marty Cullen, VP and Jim Holderman, Senior VP Lehman Brothers. In this program, Marty Cullen and Jim Holderman discussed client identification and documentation, financial crime prevention and intelligence. They also provided definitions of money laundering and a review of the U.S. Patriot Act requirements and enhanced due diligence. The two, who have MLS degrees, discussed how their careers had moved from Lehman Brothers' libraries to other research groups. They offered suggestions for librarians to consider to see if they were interested in undertaking a control function with a firm.

Much of the customer identification program involves identifying and verifying information—asking who, how and what—questions that help define the profession of librarian/information professional, according to the speakers. Knowing your customer helps protect a company by reducing the reputational risk, operational risks and legal risks. The rapid response to information inquiries on potential customers is accomplished, in part, with the use of ALACRA, which provides the capability to search several hundred databases at one time. **ALACRA** sponsored the breakfast.

The moderator received numerous very favorable comments on the program's content and also on the superb presentation given by Marty and Jim.

Discovering and Delivering ROI (co-sponsored by Solo Division and B&F)

Speaker Michelle Burylo, Air Products & Chemicals Inc. Michelle gave a quite detailed look at Air Product's development and continuing implementation and improvement of its Gold Nugget Award program. The program, which has been going strong for several years, involves several staff members working together year round to solicit and evaluate feedback from information services users. Three or more clients are selected each year for Gold Nugget Awards based on their smart use of information services. Feedback—ROI statements—are solicited in terms that correspond with clearly articulated, company-wide critical success factors. The awards are publicized and presented in ceremonies within the client's own group.

Clients that are not selected for Gold Nugget Awards, but that have cooperated in the feedback solicitation effort receive "job well-done" letters, called Gold Dust Letters.

Michelle was an excellent presenter and the Gold Nuggets program sounds like one of the rare successful ROI demonstrations.

"What Do You Do When Your Subject Doesn't Want to be Researched?"

Moderator Andrea Thomas, Ernst & Young with speakers Vicky Platt, Willamette Management Associates and Sylvia James,

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Sylvia James Consultancy. We've all run into those subjects that just don't want to be researched, whether it's a private company or a small industry sector or sub-sector. Sylvia James and Vicky Platt addressed this very topic, sharing their knowledge and experience about tackling such hard to research subjects.

Sylvia discussed her strategies on how best to tackle such a research quandary, including how she has developed research models to help streamline her research. She provided advice on communicating research results to customers by using a research model and also leveraging this model to brand your USP (unique selling product). Sylvia fielded several questions about international company research and also referred the audience to her series of articles in Business Information Alert on international companies as well as her research models.

Vicky discussed her extensive experience researching professional sports leagues (i.e. NFL, MLB, NHL, NBA) to uncover financial data for business valuation purposes. She methodically laid out the situation, offering a myriad of strategies for researching information on this hard to find industry, and cleverly peppered her presentation with sports metaphors and graphics. Vicky encouraged researchers to get to know their topic from industry trends (rules of the game) to key industry stakeholders and regulatory bodies (players, leagues, and scorekeepers) because all of these elements can lead to possible sources of information such as publishers, industry associations, and experts. Her slides were loaded with specific sources such as traditional articles, books, and grey literature; stakeholders such as leagues, associations, venues, legal/government sources, investors, and experts; as well as Web logs. While her presentation was focused on the professional sports industry, Vicky's methodology and search strategies could readily be applied to other hard to research subjects, companies, and industries.

As moderator I offered to send the presentation slides to individuals if they gave me their business cards at the end of the session. I received cards from 32 attendees and almost every one of them expressed their appreciation and provided positive comments regarding the session. The session was certainly a success. Thanks to **Mergent, Inc.** for their sponsorship of this session.

"Speed Dating with Division Sponsors—a Vendor Update"

Moderator Ann Cullen, Division Vendor Relations Chair, introduced a panel consisting of representatives from premium level Division sponsors (funding of $3000 or more) who spoke about how they're using new technologies to meet user needs. Each speaker had 10 minutes to present and highlighted various new developments at their companies. The "speed dating" theme was embraced enthusiastically by most of the panelists, including illustrations of hearts, etc. event. Some time was left at the end for questions, but there were very few. Probably everyone enjoyed getting the overview and then had to move on to the next event.

In general this session was very well received by the vendors and the audience. This format in which the vendors focus on one aspect of their offerings and then let the audience

choose to follow up with them on the exhibit floor seems very popular as it delivered a lot of information in a very short time. Panelists were: Steve Goldstein, Alacra; Stephen Garfield, Copyright Clearance Center; Aaron Gutowski, Datamonitor; Julia Mair, Factiva; Mike Finnegan, ISI Emerging Markets; Bobby Schrott, LexisNexis; Tim Brander, Onesource; Thomas Finn & John Quealy, S&P.

Thanks again to everyone who worked so hard to pull these sessions together.

Toby Pearlstein
Chair

Conference Connections *Christopher Hoeppner*

CONTINUING EDUCATION IN BALTIMORE

■ The Business & Finance Division has successfully arranged and presented continuing education courses for many years. At the Baltimore conference in June 2006 a total of four courses were offered. More than 100 B&F members and others participated in these sessions. These courses are a valuable opportunity to enhance one's conference experience with coverage of a particular topic in greater depth than can be offered in a regular conference program. Watch future issues of the *Bulletin*, the B&F Web site and listserv and, of course, the conference program for details on B&F's CE offerings at the 2007 conference in Denver.

The courses presented in Baltimore were in-depth presentations focusing on four specific areas of business research. Private equity continues to be a topic of increasing interest to information professionals, and it is the focus of a recently formed section within the Business & Finance Division. While many information professionals have heard the term private equity, fewer have a good understanding of what it means, and fewer still are well-prepared to do research in the field. At the Baltimore conference, Clifford Perry (Warburg Pincus LLC, and U.S. chair of the Private Equity Section in B&F) presented "Private Equity Research: Tools of the Trade." The course gave participants an overview of the private equity industry and the information needs of deal professionals and took an in-depth look at guidelines and sources for research, concluding with a game to reinforce key concepts.

Pamela Handman and Kathleen Nichols (both of KPMG LLP) presented a new course on "Mergers and Acquisitions Research: Behind the Scenes." Handman and Nichols are two researchers whose work is focused in mergers and acquisitions. They designed the course to give participants an understanding of the mergers and acquisitions industry, M&A-specific information sources, and other information tools and strategies used in researching information throughout the mergers and acquisitions life cycle. The course syllabus was divided into three parts: The Setting (the M&A industry and its life cycle, including special considerations in researching cross-border transactions); The Players (identifying and screening buyers, sellers, and transaction advisers); and The Plot (investigating the "story" behind a transaction, e.g. accounting and regulatory issues, deal structures, deal comparables and industry multiples).

Another new course this year, "Industry Research Using U.S. Government Sources," was presented by Jennifer Boettcher (Georgetown University), who is the co-author of a recent book (Jennifer C. Boettcher and Leonard M. Gains, *Industry Research Using the Economic Census*, Greenwood Press, 2004) on the topic of the course. The aim of the course was to develop participants' proficiency at finding industry information from the Economic Census and in evaluating various data sources for additional industry information. Other goals were to develop critical thinking skills related to working in a business-supportive environment and to provide practice in extracting data, interpreting it and presenting it in a useable format. Participants received a DVD of current Economic Census data.

Last but certainly not least, independent consultant Sylvia James once again presented her course on company research that has been given for several years to large SLA audiences with excellent reviews. Sylvia has been doing research on private companies throughout the world for many years, noting

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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 Baltimore to present "a model that might be used to successfully acquire whatever published information is available on any private company wherever it is incorporated."

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Hal Kirkwood, Toby Pearlstein, Sylvia James, and Cris Kinghorn at the Division Meeting & Luncheon

Conference Connections *Awilda Reyes*

2005–2006
GRANTS AND STIPENDS

This year, the B&F Division presented two professional grants awards and four student stipends at its annual business luncheon meeting; held at the SLA annual conference in Baltimore, MD. Each of the awards was worth $1,200 and used by the winners to attend the SLA 2005 Annual Conference. All of the winners are members of the SLA Business & Finance Division.

The student recipients worked as Proctors, helping with the CE courses offered by the division. They also agreed to serve on one of the B&F Committee Roundtables during 2006/07. The grant winners will be serving 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: Zaida Díaz from University of Maryland; Geneviève Lemire, previous student stipend winner from Bombardier Amphibious Aerospace Quebec, Canada; Laura Leavitt, previous student stipend winner from Michigan State University and Christine Reid, University of Strathclyde, Graduate School of Business, Glasgow, previous grant winners. Esther Gil is the advisor and past chair of the committee. We had the task of evaluating 13 applications for the student stipends and 7 for the professional grants.

Biographical information about this year's winners and their essays are provided below.

Award recipients

Professional Grant Award Winners

Eileen Davenport currently works at Harris Nesbitt as a Research Analyst and at Moraine Valley Community College as a Reference Librarian and Instructor. She also has previous work experience as a Content Analyst for KPMG and an Archivist for Motorola. She graduated from Dominican University with a Masters of Science degree in Library and Information Science and from St. Mary's College (Notre Dame University) with a Bachelor of Arts degree. She used the professional grant to attend this year's conference to further her professional development. Without this award, she would not have been able to attend.

Receiving the professional grant award was a much appreciated privilege. From the moment I arrived in Baltimore until the time I left my last session Wednesday afternoon, there was always an opportunity to learn.

My first clue regarding the busyness of the Conference came when I visited the SLA Web site to use the Online Conference Planner. Wanting to make the most of the time spent at the convention I read through all the session descriptions, checking off those sessions that sounded appealing and hoping to set my conference schedule before making plans to catch up with distant colleagues. That hope was soon disappointed, as the online planner kept giving me gentle reminders about potential

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time conflicts. Private equity sources or speaking with confidence? Becoming a value-added information professional or stress management? Competitive intelligence models or the science of chocolate (complete with taste test)? These hard choices were made easier by knowing that there is nothing to lose. I decided, and the Conference events bore me out, that there was really no wrong decision. If only all decisions were like this.

My onsite Conference experience began on Sunday with SLA president Pam Rollo overseeing the ribbon cutting for the exhibit hall. As we were told, this year's hall had the most exhibitors in the past ten years. Having been to previous exhibit halls (in Philadelphia, Los Angeles and Nashville) the increase was noticeable. And welcome. As always, the exhibitors were informative and helpful in demonstrating new and existing product functionality. I do have an open request for all future exhibitors: bring back the interactive games (such as the LexisNexis Search-Off and Elsevier's Scopus show) and the massages.

The Opening General Session was held on Sunday night this year. Keynote speaker Gwen Ifill used her broadcasting and journalism experience to illustrate the importance of information professionals. Referring to our evolving culture where the informational cart is always put before the horse, or to quote Ms. Ifill, "conclusions are reached before facts bear them out." It was a jarring reminder of how information can be taken for granted. With blurring distinctions between facts and opinions, our professional responsibilities are becoming more necessary than ever while the open access to information can obscure the significance of all the contributions information professionals make. With this reminder of the challenges and the shared responsibility of information professionals and journalists to share the best and most accurate information, the Sunday round of receptions began.

Monday began with a breakfast session sponsored by Standard & Poor's. Sam Stovall's presentation on successful investing advised leveraging not only individual behavioral traits, but looking at society's behavior and utilizing that. No matter what else happens in the market, there are some human characteristics that don't change; history has shown that investing in these behaviors is generally successful. And Mr. Stovall also debunked some myths about investing. Over the long-term, the top performers had a better return on investment than the underperformers. In investing as in the rest of life, it is best to acknowledge weaknesses and emphasize strengths.

Dr. Ken Haycock of San Jose State University gave a presentation entitled "Developing Leaders" and began with the provocative statement that our profession is widely populated with people who are reluctant to take charge. The consequence of this characteristic is that the leadership positions are going to people outside of the profession. For the most part, information professionals create or foster strong, healthy departments within the larger organization; to be true leaders, we must define ourselves within the organization as community leaders with a defined niche while remaining customer focused and market driven. The tasks, skills and attributes of leadership were reviewed, and I left this session with a checklist to bring back to my own work environment. The next session, "Cultivating a Champion: Partnering with Groups" by Kelly McNamara on partnering with groups, offered additional examples of demonstrating leadership in familiar environments. For me, personally, these turned out to be timely presentations. The message of both acquired special significance shortly after returning from the Conference when the surprise departure of our manager resulted in new leadership. Though we will miss our long-time manager

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and department founder, the chance to further develop the ideas that came out of these sessions does placate the loss.

The Business & Finance Division Awards Reception and open house was held Monday evening. The Division Awards recipients are impressive leaders that exemplify what the day's sessions advocated. The award winners present a high professional standard. Their examples are inspirational. Finally, the Dialog and Thomson Scientific party at the National Aquarium was a fun way to end a busy day. The food, company and setting were enlightening. Baltimore had many opportunities for interaction, perhaps more than in previous years. From the vendor parties around Baltimore to the Business & Finance Division receptions and business lunches, there were many people to meet and opportunities for idea exchange.

Tuesday was another full day. My day began with a breakfast session sponsored by Thomson, "How Private Equity Data is Collected," presented by Darrell Pinto. The behind-the-scenes views of everyday tools are always interesting. Such sessions provide me with the answers to my questions as well as the questions of patrons. Once again this session proved timely, especially when combined with Mary Ellen Bates' advice from "Becoming a Value-Adding Information Professional." Thanks to these two sessions I was better able to deal with a private equity project upon my return to work. To add value, Bates suggests distilling the information for the client and presenting the information in a way that is easy for the client to digest, but never sacrificing quality. This repeated a theme from an earlier presentation: once credibility is lost, it can never be regained. The push towards new methods of information delivery, however attractive these new technologies may look, cannot be confused with the information itself. Data/knowledge/information is still the primary driver of the profession; the means are just the tools used for transmittals. This point illustrates an underlying truth to the profession: new technology may change the way information is obtained and delivered, but information itself does not change. It is the responsibility of information professionals to combine our skills for locating the information with the technical expertise to delivery that information.

The final speaker, Walter Mossberg, alluded to this subject in his closing speech. A little more than one hundred years ago, electricity was this new grid that many people were getting used to, but today no one thinks anything of it. It has faded into the background. This predicts how society will evolve in its regard of the Internet. As future generations will not even imagine a world without it, this information grid will assume electricity's place in society's collective consciousness. And the tools used to access this information will change. According to Mr. Mossberg, the personal computer has peaked in its influence. Portable technologies are growing in prominence and eventually another generation will replace these with constantly improving devices. But while the tools evolve, and though information will remain increasingly available, the availability of the information does not guarantee credibility. If anything, Mr. Mossberg's speech reinforced the importance of maintaining integrity. Using the anonymity surrounding Yahoo! Answers, Mr. Mossberg pointed towards the potential damage that could be caused by the rapid exchange of unverified information or opinion disguised as fact.

Credulity and credibility were implicit themes in some sessions and explicit themes in others. These are the counterpoints of the information age. As information professionals, we know to assess the validity of the information out there, but what about the growing population who don't make similar distinctions? As the availability grows, so too does our responsibility to disseminate accurate information.

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The Closing General Session saw incoming SLA president Rebecca Vargha assume her role and offered previews of next year's Denver conference. The final sessions of the Conference were well-attended. Even the early morning session on competencies within knowledge transfer organizations exceeded capacity. In "Competencies: Current & Future in the Knowledge Transfer Organization" Dr. Arthur Murray's observations and advice about timely connection of the right people and the right knowledge were insightful. Genie Tyburski and Jenny Kanji continued their tradition of presenting 60 memorable Web sites in 60 minutes, countering the serious with the frolicsome. Amelia Kassel's "Elusive Private Company Information: Search Secrets Reveals" offered new insight into researching companies that live beyond the information radar, and was a satisfying finale to the Conference.

I went to Baltimore with high expectations and every one of them was surpassed. Each session had something that would reinforce existing or create new professional competencies. Once again, I'd like to express my appreciation for the Business & Finance Division's sponsorship of the award and Awilda Reyes and the grant committee for their work. This has made a positive impact on my professional development, and I look forward to working with the Division in the future. Until next year!

Christina Zeller is currently employed as a Web Content Strategist at the British Columbia Securities Commission, where she has worked since 2001. She also is an Assistant Instructor for a course entitled "Internet for Investigations" offered through the British Columbia Institute of Technology. She has prior experience working in the Koerner Library at the University of British Columbia and in the field of knowledge management. She obtained her MLIS as well as her undergraduate degree in English Literature from the University of British Columbia. Christina has been very active in SLA since joining and served as President of the Western Canada Chapter in 2005.

I was very happy to receive the news in April that I was one of this year's recipients of the SLA Business & Finance Division's Professional Grant award. Because of the Business & Finance Division's generosity, I was able to attend the conference in Baltimore, take advantage of wonderful professional development opportunities, see SLA colleagues again, and meet new members of our profession.

I arrived in Baltimore on Saturday night, and wasted no time in reaching the Business & Finance open house so that I wouldn't lose a minute of the socializing opportunities at SLA – one of my favorite parts of our conferences are the great open houses.

Sunday morning I attended the Leadership Development Institute, where we talked about ideas for the 100th anniversary of SLA in 2008. Members presented their thoughts for how we could celebrate our past, and I contributed my hope that we could recognize our future by profiling some of the alternative professional roles that our members fill in their organizations. As a librarian managing Web site projects, I'm always curious about the variety of roles that other information professionals fill. It's exciting to hear about the range of opportunities we have as a result of our expertise in information.

Sunday afternoon found me at a sold-out session on Web 2.0, presented by Factiva. I had a great time finding out about new sites and "mashups"—my favorites were Rollyo.com (create a personal search engine), marumushi.com (for news junkies), and housingmaps.com (great for fast-paced housing markets).

From that moment on, I packed every minute of the conference with activity. I filled my day with every available session, learning about

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statistics, how to tackle difficult research questions, knowledge management intranets—I even created an animation in Flash! I thought this year's conference provided an amazing range of programs, allowing me to find a relevant session at every interval, even though many wouldn't consider me a typical special librarian. I love that SLA recognizes the breadth of roles that we can fill, and that so many of us are working on interesting projects, and sharing what we learn.

Monday evening found me hopping between the Canadian reception and the Business & Finance awards reception, as I balanced my desire to meet new people in B&F Division, and thank everyone for receiving this grant with my responsibilities as President of SLA Western Canada Chapter.

At the Business & Finance luncheon on Tuesday, I joined a table of familiar faces, where I quickly discovered that they were all B&F board members! It makes sense that the faces I see most often at events are the ones that are most active leading the division. Of course, at a table full of motivated leaders, I couldn't stop myself from volunteering to help out the division in the future. I was thrilled to hear about the Division's new wiki and look forward to contributing resources to it. Having just launched a knowledge sharing wiki at my workplace, I've seen the excitement it generates as people get their own experience with a leading-edge technology.

One of the most interesting sessions I attended was Stephen Abram's presentation of the results of the 8Rs Canadian Library Human Resource Study" (at http://www.ls.ualberta.ca/8rs/). The study looked at the issues for our profession, including examining the belief that we are reaching a crisis point in retirements, and that there will be a huge need for new librarians in the near future. I was fascinated to learn that in Canada, this may not actually be true. Instead, we're facing a skill gap. There are plenty of young librarians to fill in for retirements, but they don't have the management and leadership skills that these positions require. Steven mentioned Northern Exposure to Leadership as one way that Canada's librarians are working to fill this skill gap. Last year I had the privilege of attending Northern Exposure, and it was an exceptional experience. I left the conference feeling motivated to continue pursuing management and leadership opportunities wherever I can, taking advantage of what I learned through Northern Exposure, and what I continue to learn from SLA activities.

The unfortunate part of the way I packed in my sessions at SLA was that I didn't see Baltimore at all. If it wasn't for the vendor-hosted events at the Aquarium, I would have missed even that nearby site. My brief walk along the harbor showed me the beauty of a city that has taken full advantage of its waterfront with its boardwalk restaurants and terraces over the water. Even coming from Vancouver (which has spectacular scenery), I envied Baltimore its great places to eat and drink on the water on a summer night.

I couldn't have attended the conference this year without the generosity of the B&F Division, so I extend my thanks to all the division members, and especially to the awards committee. SLA 2006 was a fantastic experience.

Student Stipend Winner

Judy Eckoff received her Masters of Library and Information Science degree from Dominican University in May of 2006. While a student at Dominican, Judy worked as a practicum student at McDonald's Corporation and as a Serials Assistant at the Northwestern University library. Her educational background includes a Bachelor of Arts in History from Northwestern University as well as a Masters of Arts in History from Western Michigan University. Prior to entering

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the field of librarianship, she worked for eight years as a Program Manager at a project management training firm and served two years in the Philippines with the Peace Corps.

I am very grateful to the Business & Finance Division for the stipend I received to attend the 2006 SLA conference in Baltimore. This was my first library conference and it was very valuable as I begin to find my way in my new chosen profession.

I graduated in early May 2006 from Dominican University in River Forest, Illinois with a Master's Degree in Library and Information Science. I had been to Baltimore on several occasions while I lived in Washington, DC for eight years, and looked forward to spending more time there. I was disappointed to learn that the Orioles wouldn't be in town during the conference, but that turned out to be a good thing, since I kept so busy with the conference events.

Logistically, I faced some challenges since I ended up at a hotel about a mile from the Convention Center. I wouldn't have minded walking back and forth, but the hotel staff advised me that this wasn't safe, so I relied on the hotel shuttle in the morning and taxis in the evening. Most days I took the 7 am shuttle to the Convention Center and didn't go back to the hotel until after the evening receptions. Although this made for very long days, it also forced me to be very selective about the materials I picked up in the Exhibit Hall and take only those items that I really intended to use or read later.

The greatest learning I had from the conference was the diversity of librarians in attendance. The variety of sessions that I attended was really amazing. I learned about newspaper digitization projects, taxonomies and ontologies, measuring return on investment, career strategies, and merger and acquisition research. These sessions and workshops were all instructive in their own areas, but the larger message I got from the conference is that there are so many specialties in the special librarianship that one can continue to learn and grow throughout one's career. I was fascinated to hear about all of the environments in which SLA attendees worked. Many were in academic environments, as well as law firms, private businesses, non-profits, government, and others had their own businesses. I was surprised to find many attendees were from outside the United States.

The keynote speakers, Gwen Ifill and Walter Mossberg, were great speakers and brought unique perspectives to the conference. In fact, all of the speakers I heard were experts in their field and shared meaningful wisdom gained through experience.

Having recently graduated, I was in the midst of my job search while at the conference. During the conference, I was offered a job in Chicago at the Center for Research Libraries, which I accepted and have recently started. While this job opportunity was separate from my involvement with the SLA conference, I was gratified to find my colleagues at SLA who were very supportive and encouraging when I told them about my new job. The conference is clearly an excellent way to meet colleagues, share ideas, experiences and opportunities.

Mary Beth Slade is currently a student at Dalhousie University enrolled in a joint Business Administration and Library and Information Studies graduate program. As an undergraduate majoring in English at Dalhousie, she completed French and international development courses and was presented with the Paul McIsaac Memorial Prize by the English Department. This prize is presented to an undergraduate student who shows a "...enquiring and original mind." She currently works in the Patrick Power Library at St. Mary's University as a Student Cataloger.

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Learning the Value of our Profession

As a student and first-timer at this year's SLA conference in Baltimore, I suspect that my experience was a great deal different than most veterans'. For starters, I was working on building my network rather than reconnecting with it. The B&F Open Houses and the Business Luncheon were ideal for this and I appreciate every experienced SLA-er who took the time to speak with me and my fellow first-timers. A student attending a professional conference enters with an entirely different perspective than a long-time practicing professional does. I hope to give you a sense of what it feels like to be a student at SLA for the first time. I want to thank the Business & Finance Division for making my SLA conference experience possible and for believing in the new generation of information professionals and trusting that we have worthwhile ideas to contribute.

In the academic world everyone is talking about the "graying" of our profession. I confess I did not realize the truth of this statement until the conference. It was a sea of (very elegant and distinguished) gray hair! Of course it is sad to see all this wonderful talent leaving the profession, but at the same time I am excited that this exodus is not happening quite yet, so us new-comers still have time to learn from our predecessors. And although I do have much to learn from practicing professionals, I also discovered that many of the technologies and ideas I took for granted were being presented at the conference as new phenomena. It became clear to me that both young and experienced information professionals can learn so much from one another.

The Annual SLA Conference is to many people a professional development venue. For me, it was a venue for professional commencement. As a joint MLIS-MBA Candidate for 2007, there are a number of career options available to me and I came to this conference with hopes of narrowing my career direction in some way. I think I was successful. After attending the Competitive Intelligence keynote session on Monday morning, I think I can safely say that this is going to be my pursued career path. Through the rest of the conference I took opportunities with vendors and professionals to learn more about the competitive intelligence field and how suited my skills are to it. It turns out I have met my match!

The SLA conference is not just a chance to grow professionally, but also to grow personally and develop sides of you that get neglected in the race of life. One pleasure was a tour of the American Visionary Art Museum (http://www.avam.org/). Their view of art truly is visionary as they see it as a medium for social change and this vision is reflected in each exhibit and piece. I also indulged my love of chocolate with a session on the Science of Chocolate presented by the senior research specialist at Hershey. I had a good belly-laugh at the Business Intelligence session given by the Daniel Franklin of the EIU. His hypothetical top-ten companies of 2066, including BollyDisney, Google-Goldman Sachs and MyMcSpace, were both witty and poignant. I hope many of you got a chance to take in these sessions.

And by now I am sure you are all familiar with the grace and intellect of the Opening Keynote speaker, Gwen Ifill, who illustrated that information professionals have a role to play in many industries and that out profession never has been, nor never will be, dispensable. Another thanks to the Grants and Stipends Committee and B&F for helping me realize once again the value of the profession I am now so committed to!

Thomas D. Sullivan is currently enrolled in the Graduate School of Library and Information Science at Queens College and completed his undergraduate work in the Great Books Program at St. John's College in Annapolis,

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Maryland. At various times in his career, he has worked as an architecture critic and letters editor, a publicist, an editorial specialist, and a freelance researcher and writer. His most recent position was that of a researcher at a large global financial services firm. His work has been published in BusinessWeek Online, *Insight* magazine, *The New York Times*, Oculus, *The Washington Times*, and Wilson Quarterly.

The 2006 SLA meeting in Baltimore was a great opportunity for me, professionally and personally, and I'm grateful for the Student Stipend Scholarship that made it possible.

A few events and experiences stand out as especially illuminating and encouraging.

A CE class on researching private equity firms, taught by Clifford Perry, Director of Information Services at Warburg Pincus, was particularly helpful in providing context for my professional research. For the past year, much of my work has been related to the financial sector. Perry's class explained the basics of how one type of private investment firm works, and described the electronic and print resources that are most useful for researchers working in that area.

In addition to providing an overview of how private equity firms work, Perry also described some of their methods of investment, which then, in turn influences other aspects of the financial markets. This class helped me understand one part of the financial sector, and in turn, more about trends in that space.

Especially striking was Bruce Rosenstein's presentation on Peter Drucker and oral history. Rosenstein, News Research Librarian for *USAToday*, spoke about the influence of Drucker, who coined the term "knowledge worker," and the continuing value of Drucker's insights on work and management.

Having read some of Drucker's writings about work and management, I was intrigued to see a videotaped interview that he did with Rosenstein. Drucker said that every person needs a number of dimensions to his or her life, and suggested that one shouldn't limit one's efforts to a single field of work.

As I recall, Rosenstein mentioned that Drucker thought very highly of nonprofit organizations, especially since they gave people opportunities to develop leadership skills—opportunities that aren't so readily available at their "day jobs." This reminded me of the value of the Special Libraries Association as a place where one can serve one's fellow professionals and acquire experience in organizing and leading activities.

No major meeting experience is complete without a chance encounter that opens one's eyes. While attending the Competitive Intelligence Division business meeting and breakfast, I met a librarian who worked at a database provider. Our conversation started as the breakfast ended, and continued in the convention hall. She offered a great deal of valuable advice about recognizing and fulfilling the needs of one's organization—and getting recognition for those achievements. One advantage she had, she said, was that she joined a firm when it was a new, which gave her the opportunity to shape her own job description.

This, I find, is a very valuable type of professional advice, gained by work experience and enriched by reflection. And I found it by chance, running into someone who was willing to share her wealth of professional knowledge.

That's why the SLA meeting is a great opportunity, and why I'm deeply grateful to the Business & Finance Division for making it possible for me to be there this year. I'll make a point of being there for future SLA meetings.

Rachel Watstein is currently working towards her Master of Science degree in Library and Information Science at the Palmer School of Library and Information Science. She also has a Master of Business Administration degree

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from Fordham University and a Bachelor of Science degree in International Business and Marketing from New York University. She has extensive experience in the marketing and publishing fields and operated her own independent consulting firm for a number of years. In addition to winning this award, Rachel was also the recipient of the SLA-New York's Student Scholarship in 2006 and was selected to serve as the Graduate Assistant to the Director of Palmer's Manhattan Program.

Since I joined the Special Libraries Association in June of last year, I feel like I have been taken under its wing and have been offered professional, educational and personal opportunities that would have never taken place without being an active member of the New York Chapter of SLA and, of course a Business and Finance Division member. The same week I left for the Annual Conference, I accepted the New York Chapter's tuition scholarship at their annual business meeting and then two days later, I was bound for Baltimore on Amtrak which thankfully was an uneventful ride unlike so many Amtrak journeys.

I remember from being at one time a professional meeting planner, how I was often more interested in the content of the meetings than how cold the meeting room was or if the chicken served at lunch was too dried out. This was exactly the case in Baltimore. Selecting what SLA sessions to attend over the course of the pre-conference days and the main conference had me analyzing the online conference program and reworking my Personal Planner for hours—literally. How does one select which SLA sessions to attend when they all look so interesting?

Since I had recently taken a superb knowledge management course at Palmer, I knew that I wanted to focus some attention on those sessions as well as competitive intelligence which is a topic I had developed a very strong interest in as a result of attending two SLA Virtual Seminars. New technology trends and innovations are also two major interests of mine so those sessions too got highlighted.

Fourteen sessions, two keynote addresses, hours in the Exhibit Hall and many open houses later, much of the knowledge I have gained from the SLA conference has already been put into practice and after distributing nearly 100 business cards, I know I have made contacts that will be with me throughout my career.

Sessions that particularly stood out for me include:

- Researching Listed and Private Companies Globally: A Guide and Model. Sylvia James did an outstanding job presenting guidelines as well as specific sources for this type of research.
- SLA First-Times and Fellows Connect. This was a great opportunity to meet with other first-time conference attendees and hear from the Fellows what SLA has meant to them over the years.
- Keynote Session with Gwen Ifill. After hearing Ms. Ifill speak so captivatingly, I am now a regular NewsHour with Jim Lehrer viewer.
- Innovation: How Exactly? I have always enjoyed Stephen Abram's column in Information Outlook and hearing him speak live on how to bring innovation into the field of librarianship was both stimulating and challenging.
- Knowledge Management Roundtable. After initial introductions, attendees sat at tables that focused on a particular area of knowledge management. I selected to sit at the taxonomy table where we talked about such things as how to create taxonomies when you are dealing with thousands if not millions of documents. We also had a lively discussion about using a set of controlled vocabulary versus social tagging.

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- SLA Hot Topic: Web 2.0—Making Use of Collaborative Applications. This superb session not only covered the theoretical definitions of Web 2.0 and products, but it also showed how National Geographic was specifically using Web 2.0 applications and what worked and what has not worked in these areas.
- Competencies: Knowledge Sharing. This was truly a lively, exciting session to be a part of with attendees not only standing in the back of the room, but sitting on every inch of the floor. Much like the course in knowledge management that I took at Palmer, one could easily tell that Arthur J. Murray was keenly adept at engaging an audience and sharing knowledge through his very untypical PowerPoint presentation and actively throwing the floor open to session attendees for feedback to the ideas he was demonstrating.

The SLA Annual Conference did not end for me once I returned back to New York on the June 14th. That weekend I must have sent out at least 50 e-mails to people I had met and now correspond with many of them on a regular basis. I also e-mailed many of the speakers of sessions I attended to get their presentations and to ask follow-up questions and have been delighted at how open the presenters are in continuing a dialogue with me. I have given out a number of the conference presentations to Palmer students and faculty who, unfortunately for them, did not have the opportunity to attend the conference. I have also started to conduct further research on taxonomies, Web 2.0 and Library 2.0 applications and continued my research in the areas of knowledge management and innovation.

I look forward to being a very active member of the Business and Finance Division of SLA in the future and after my fantastic experience in Baltimore, there is no doubt in my mind, that I will be one of the first people to register for the 2007 Annual Conference in Denver.

Awilda Reyes
West Chester University of Pennsylvania
Grants & Stipends Committee Chair

Division members at the Open House on June 10, 2006

Conference Connections

Leslie Reynolds

2006 CENTER OF EXCELLENCE AWARD

■ The Business & Finance Division of the Special Libraries Association proudly announced the winner of the fifth annual Centers of Excellence Awards at the SLA Annual Conference: J. HUGH JACKSON LIBRARY, GRADUATE SCHOOL OF BUSINESS, STANFORD UNIVERSITY. The award recognized the development of quality practices and services. The judges were especially impressed with their approaches to tracking goals directly to customers' needs, encouraging staff at all levels, as well as soliciting continuous feedback to evaluate their services and identify areas for change or improvement.

A panel of judges, who are members of the Business & Finance Division, evaluated all entries. Thank you to the 2006 judges who determined the winner: Susan Fifer Canby, Helen Katz, Cindy Lenox, James Olney, and Sylvia Piggott.

The presentation of the award for Service Excellence occurred on June 12, 2006, during the Business and Finance Division Awards Reception. 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.

Thank you for this very prestigious award. The staff of Jackson Library is very excited to be recognized for our excellence in customer service. The J. Hugh Jackson Library is administered and funded solely by the Stanford University Graduate School of Business (GSB). The Library's staff of 25 serves the GSB community: 750 full-time MBA students, 108 PhD students, 54 Sloan students in a one-year executive Master's program, 129 faculty and lecturers, and 325 staff. Library staff provides services to an extensive Executive Education program of part-time students, the School's four major research centers, GSB alumni, Stanford University students, and the local business community. All Library service programs are designed to support the School's mission:

- GSB Mission

  "To create ideas that deepen and advance the understanding of management, and with these ideas develop innovative, principled and insightful leaders who change the world."

In 2002 Jackson Library was languishing. Although the library was recognized for the excellence of its collection, its value to the Stanford Graduate School of Business (GSB) was limited while it drifted without clear direction or a defined mission. Despite a talented staff and excellent resources, the Library was at odds with GSB administrators and isolated from the rest of the school. Staff morale was at low ebb. An offhand comment by the new Business School Dean that referred to the library as "a warehouse of dusty books" made the staff apprehensive about its future.

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Today Jackson Library is a vital component of the Stanford GSB. The Library is as well known for its innovative products and services as it is for its excellent collection. This turnaround happened because the staff of the library was willing to reexamine everything we did through the lens of the customer.

In 2002 the Library Management team developed a new strategy focused on raising staff morale, improving customer service, and positioning Jackson as a valued partner in the research and teaching mission of the school. The first step in this process was to create our vision for the new Jackson Library and develop a plan to make the journey. The library staff gathered information about our customers and created a strategy to revitalize the library and deliver the content and services that our customers needed. We developed a group of strategic teams to oversee our various priorities – Marketing, Services, Staff Development, and Library Future.

We developed a new services strategy:

- Efficient and effective delivery of high quality content
- A highly trained and motivated staff with a flexible and entrepreneurial approach to customer service.
- Collaboration with various constituencies at the GSB to serve our common customers as a team.
- A space that supports the research and learning process at the school.

Effective, just in time, delivery of our content is the key to our services strategy and **FastJack,** the Jackson Library toolbar, is one example of our innovative efforts to create tools that will aid our customers in accessing that high-value content.

As information providers, we are concerned with distributing our content to our customers in an efficient and effective manner. A toolbar seemed a logical means to provide a persistent shortcut to our resources and services, and since most of our customers had experience with the Google toolbar, we rated the probability of acceptance high. Based on customer feedback the toolbar went through a number of revisions and today it is part of the standard desktop image for the school and for all our public computers. At the request of the Alumni office we developed the Stanford GSB Alumni Toolbar, designed specifically for alums with quick links to alumni resources and services.

Staff development opportunities have expanded and new teams and services give everyone increased ownership and leadership experience. Since an entrepreneurial outlook is implicit in our strategic goals, the Library organization migrated to a more team-based structure that offers increased staff development opportunities for all. Cross functional teams give individuals opportunities to develop new skills and leadership abilities. Staff members are also more engaged in identifying and implementing new services as they build upon previous successes. Staff now actively look for ways to enhance our services and add value to the work of our customers. Library staff members serve on a number of school-wide advisory groups and committees and we use these roles to identify opportunities where we can add value through additional products and services and to identify potential partners and customers for new services.

This past summer we had the opportunity to change the look, feel, and functionality of the library space. Thanks to our renovations the library is an energized vital space and a destination for students. To accommodate the space needs of the GSB, we moved 100,000 of our infrequently used titles offsite and worked with an architectural firm to design a library space that would be more flexible and better serve our customers' needs. Our goals in the renovation were to

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create a warm and welcoming space that was more integrated into the daily life of the GSB. We have succeeded beyond our expectations. The use of our remodeled space has increased 23% since the beginning of the school year and it has become the venue of choice for many of the School's official functions.

Collaboration has become a central theme for our customer service approach. In thinking about our targeted customers and the types of products and services that would be useful to them, we realized that we would be competing for their limited time and attention with other groups at the GSB for whom they were valued customers as well. In other cases our customers were striving to serve the same audience we were. From this insight our Services Team developed our collaboration model. Some examples of our joint ventures include:

- Working with the Career Management Center to develop "Job Search Secrets", an interactive workshop taught with a focus on job-searching tools. The CMC staff and two librarians teach the workshop collaboratively. The librarians provide content and research expertise, and the CMC staff provides specific job counseling advice.
- Partnering with the Lifelong Learning Department of the Alumni Association to provide databases and other research services to our Alumni.
- Teaching a course on business databases at the law school library
- Providing research support and targeted web pages for many of the specialized programs in Executive Education.

We are constantly seeking customer feedback and modifying our products and services based on that feedback. We have developed mechanisms to keep abreast of what is going on at the GSB and identify opportunities where we can make a contribution. We take every opportunity to participate in and contribute to school wide programs.

All libraries face new challenges as information sources proliferate and customers expect direct and immediate access. Providing innovative and efficient access to content and value-added services in collaboration with GSB colleagues is our strategy to carve out our niche in this new environment. Though our customers are pleased with the projects and services currently offered, we continue to solicit feedback from them and to look for opportunities to expand and enhance our offerings. Even more important than content, are the ongoing relationships that we are building with our customers and colleagues. These partnerships are our biggest assets and the keys to our future service development.

The Centers of Excellence award is recognition of what we have accomplished so far, and will serve as a catalyst to our continuing innovative efforts in meeting the evolving needs of our diverse customers.

These 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. The winner in 2006 represented service excellence and quality at its highest level.

FastJack, the Jackson Library toolbar

To apply for the 2007 Business & Finance Division Centers of Excellence Awards, please see the application guidelines in this issue of the Bulletin and on the B&F Division Web site.

Find additional background information on the Centers of Excellence Awards in the Fall 2001 B&F Division *Bulletin*, as well as on the B&F Division Web site.

Please send your application to:

Leslie Reynolds, Assoc Prof.
West Campus Library
TAMU - 5001
Texas A&M University
College Station, TX 77843
ATTN: COEA

Or by e-mail: **leslie.reynolds@tamu.edu**

E-mail is the preferred method of submitting your application.

For further information please contact Leslie Reynolds at 979/458-0138 or via e-mail at leslie.reynolds@tamu.edu

Nominations must be postmarked January 15, 2007 and all applications must be postmarked by February 15, 2007.

Reapplying is welcomed!

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

PARTICIPATE! NOMINATE! 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. If the application does not address all criteria described in section 5.2 of the COE Awards Guidelines, it will be treated as a nomination. The nominated organization will be contacted and asked to complete the application. Please note that all nominations are due January 15, 2007.

Does my organization have to be nominated to apply?

No! You can submit an application for your organization. All applications must be received by February 15, 2007.

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.

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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?

- Nominations are to be postmarked or e-mailed by January 15, 2007.
- Applications are to be postmarked or e-mailed by February 15, 2007.
- Consideration will take place between February 15 and March 21, 2007.
- Winners will be notified and announcements will be made in May 2007.
- Presentation of the awards will take place at the SLA Annual Conference June 2007.

What exactly do I send?

Send by either postal or e–mail (e-mail is preferred):

- A one–page Executive Summary declaring which category (Service, Management, or 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?

Leslie Reynolds
Leslie.reynolds@tamu.edu
979/458-0138

Additional information can be found at

www.slabf.org/centers_of_excellence.html.

Terri Brooks presenting the Treasurer's Report

SLA BUSINESS & FINANCE DIVISION
TREASURER'S REPORT AS PRESENTED AT THE 2006 ANNUAL BUSINESS MEETING, 6/13/2006

The balances in our accounts, as of May 31, 2006, are as follows:

Operating Account, Wachovia Bank	=	$84,037.56
SLA Pooled Fund Account	=	$48,860.50
TOTAL	=	$132,898.06

For any of you who keep track of such things, this is a balance $80,000 higher than what I reported at this meeting last year. Obviously, we've recovered from our cash-flow challenges of two years ago.

Your Executive Board has implemented a few new practices, mostly as they relate to our generous Conference Sponsors. The Vendor Relations Committee corresponded with our Sponsors earlier in the year than before. Commitments were received earlier, and invoices were sent out soon thereafter. The result has been that all of these Sponsors have already responded with their contributions, as opposed to our receiving most of the dollars after the Conference.

SLA Headquarters has also implemented a new policy that is more favorable to us, and to all Divisions. For the past two or three years they have invoiced us in May for a large portion of our Conference expenses, a sizable amount, over $20,000 in our case, without regard for the fact that they collect more than that from our members in CE Course tuition and ticketed event charges.

We estimate that these two income sources will generate about $30,000, and our Conference expenses will be about $70,000, for a net of $40,000 that we have committed in Conference expenses. Our budget and annual financial statement are published each year in the Spring Issue of the B&F *Bulletin* for any of you who want more detail.

Another SLA HQ initiative that has favorable consequences for us is the change in policy that relates to our surplus funds. Previously, we were strongly advised to deposit them in the SLA Pooled Fund. The revised stance is that we are encouraged to identify another vehicle, as long as it is a "principle protected account", basically money market funds. Our bank Wachovia has such an account, available only to non-commercial organizations such as ours, that historically has yielded a higher rate of interest than the SLA Pooled Fund. Your Board has authorized me to open that account and transfer our surplus funds, which I will do upon my return from Baltimore.

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.

Terri Brooks
Treasurer

Business & Finance Division
2005–2006 Executive and Advisory Board

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