BUSINESS & FINANCE DIVISION

THE BULLETIN

The Newsletter of the Business and Finance Division

Established 1958 Special Libraries Association

Number 135, Spring 2007

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SLA Connecting People and Information

From the Chair
Hal Kirkwood

THE VALUE OF THE CONFERENCE

■ Two things took place recently that made me think about the most valuable aspects of attending the SLA annual conference. First, a recent article by Steven J Bell in Inside Higher Ed (http://insidehighered.com/views/2007/04/27/bell) posits the perspective that librarians have become too nice, too polite, and that we don't generate an adequate amount of dissenting discussion. This isn't really the forum to argue for or against his view (am I being too nice here?) but what his article did do is make me think. Second, a group of ARL diversity fellows visited my university and I was discussing the merits of attending the conference with them.

What both of these thoughts pointed to as a key value of attending the annual conference is the conversations that take place outside of the sessions and keynotes. Tremendous value comes out of the chats in-between sessions or at the Division open houses. And not just from the people that you already know and that you're trying to catch up with . . . but with the conversations you have with B&F members that you've never met before. We are an incredibly experienced and diverse group of information professionals with so much to learn and share from each other. So I challenge all those attending to make an extra effort this June in Denver, Colorado to strike up a conversation with someone you've never met; what you each gain just might surprise you.

Denver Awaits

Now to the standard fare: we have cooked up, I feel, a very interesting and diverse set of sessions and speakers at this year's annual conference. Look elsewhere in this *Bulletin* for details on all of the sessions, open houses, and tour; don't forget you must register for the B&F tour of the Denver Mint (The ➜

Capital and The Coins) completely separately at http://www.sla.org/content/Events/conference/ac2007/registration/tours.cfm. Also look at the impressive group of CE courses the Division is offering to seek out opportunities for strengthening your own skills.

The success of the conference rests on the committed group of executive and advisory board members in planning and coordinating all of the B&F sessions. I'd like to extend my sincere thanks to everyone that has helped me over this past year in creating the programming at SLA Denver. I'd also like to send out a hearty Thank You to our vendor sponsors without whom we would not be able to offer such a diverse group of presenters or such an excellent batch of open houses. Please be sure to visit them at their booths in the exhibit hall to thank them for their generosity and to find out what's new in their products and services. Also come see our Speed Dating with the Vendors on Monday, June 4 at 4:00 PM to find out where they're heading in the future.

As I stated on the SLABF Web site, I'm open to hearing from you regarding B&F activities and future directions so don't hesitate to drop me a message to let me know how we're doing.

SLA Denver will be here before we know it so hurry and register. I look forward to seeing you all in Denver where you can take your career to new heights!

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Editor's Epitome

Victoria A. Platt

This is a very exciting time of the year. Final preparations are being made for the annual conference, improvements to the *Bulletin* are being displayed for the first time, column editors continue to provide excellent articles, and a Peer Reviewed article is included in this issue.

While collecting all of the conference related materials for this issue I became more and more excited about my upcoming journey to Denver. Hal Kirkwood did an excellent job organizing the details of our Division's conference experience along with his fellow board members. The Division activities for the conference are listed in the *Bulletin* and can be easily identified by the purple border in this issue. Don't forget to print it out and bring along to the conference.

The editorial staff hopes that you enjoy the layout changes implemented in this issue. A number of new graphics were added, headers and footers redesigned, fonts changed, and columns reconfigured. If you have any comments regarding the new design, they would be greatly appreciated.

An always consistent great feature of the *Bulletin* is the quality of writing by our column editors. Their commitment to the Division is outstanding and well represented this spring. We hope you enjoy their latest contributions.

One of the most exciting aspects of editing the *Bulletin* is to participate in a Peer Reviewed article. Once we learned that there was an article ready for Peer Review a group of Division members were assembled to review and comment on an article. Their anonymous comments were collected and consolidated before being returned to the authors for consideration and revision. After the authors had sufficient time to edit the article, it was then returned to the *Bulletin* editorial staff for publication. The result of this process is an article that we hope you all enjoy. The entire editorial staff thanks all those that volunteered during this process.

Until Denver.

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Knowledge Database in a Shared Business Library—Questions and Resource Links

Tomalee Doan, Michael Halperin, and Edward J. Lusk

Abstract. Several Academic Business Libraries implemented a Business focused Frequently Asked knowledge database with software created by the University of Pennsylvania. The knowledge database of FAQ's was made available to all those who implemented the Business FAQ service and they were able to copy those questions and customize the answers to their own institution resources. The knowledge database also offers searching by keywords, providing a no hits report to create questions when users fail to obtain answers to a query. Thus far statistics show significant similarities between the questions used and the resource answers from each institution.

Copy cataloging—defined as adapting a copy of the original cataloging produced by another library—is widespread, and has existed in various forms for more than a century. Library A catalogs a book ("original cataloging"). Library B owns a copy of the same book. Instead of cataloging the book "from scratch", Library B adopts Library A's cataloging, perhaps modifying part of the cataloging to suit local requirements. The success of copy cataloging depends, of course, on the similarity of resources between Libraries A and B, and on the perceived quality by Library B of the original cataloging.

One may ask why there does not seems to be an equivalent concept of "copy reference" (adopting a copy of an answer to a question produced by another library)? Why do librarians seem to be reluctant to share reference question answers instead of performing the equivalent of original cataloging for each new question they receive? One reason may be that a response to a question is not a stable entity like a book. In a library setting, the response to a question depends on a multitude of ever-shifting factors—the purpose of the questioner, the availability of resources to answer the question, and the subject competence of both the questioner and the librarian, to mention a few. A second reason may be that reference librarians are not in the habit of recording questions and answers in a form that can be shared. However, the nature of research in large academic business libraries tends to reduce the variability of responses. Here reference librarians often deal with the research problems of similar populations of students and faculty using similar sets of resources. Recently, there are licensed products with availability to share knowledge banks both globally and locally such as QuestionPoint. Libraries must pay to use the QuestionPoint service in order to have access to the Global knowledge database and can create a local knowledge base of previously asked questions and answers.

To exploit the similarity of resources and client bases (except staff hours devoted to the implementation), several large academic business libraries over the past year have cooperated in maintaining a shared business knowledge database called the Business Library FAQ. This database is an outgrowth of the Business Library FAQ developed by the librarians of the Wharton School's Lippincott Library and the Information Technology Department of the University of Pennsylvania Library (Penn). This case study examines how these academic business libraries implemented the Business Library FAQ, what types of questions were posed by users, what similarities of resources were chosen among these libraries to answer users' common questions, and what marketing strategies were used to promote the FAQ service.

As originally conceived, the Penn Library FAQ was designed to provide reference help for a wide range of questions relating to business research. Using software developed by the Penn Library IT Department, the FAQ is a knowledge database consisting of 15 broad question categories (e.g., "Finance") and about 500 specific questions (e.g., "How do I find information on venture capital and venture capital firms?") There are several thousand keywords that one can use to link a question to a source for its answer. The system allows searching for keywords, phrases, and words in combination. The specific questions and sources in the database reflect librarians' experience in responding to the questions of Wharton students and faculty, as well as feedback from the database administrative user results. The acronym "FAQ" is something of a misnomer applied to the business database that was created. The usual library FAQ is concerned with the details of library process such as hours, location or policy. Although the Business FAQ contains some Question & Answers of this type, most of the queries deal with specific business subject issues, and are often quite specific. Many of the libraries who implemented the FAQ service renamed the application to suit their own library themes. MIT calls their service The Dewey Research Advisor and the University of Michigan calls their FAQ service FinditFast!

In 2004, Lippincott Library began offering the use of the FAQ service[1] and its content to other large academic business libraries with the goal of sharing contributions to the database of questions and answers. The database is being hosted on the University of Pennsylvania's servers, but individual libraries extensively customize the appearance and contents of the database.[2]

Columbia University's Watson Library of Business & Economics was the first to adopt the shared database. A total of 20 academic business and economics libraries are now part of the cooperative. As of July 2006, ten of the libraries shared the knowledge database and had made their database public on their library Web site.

Table 1: Date Business FAQ Went Live on Library Web Site

School	Date Public
Columbia	December 2004
NYU	August 2005
Michigan	September 2005
Purdue	September 2005
Stanford	January 2006
MIT	March 2006
Yale	March 2006
Princeton	April 2006
Dartmouth	July 2006

The combined FAQ database is a unique data source for examining the range and type of questions and resources used by some of the largest academic business libraries. In the following study, we examine two aspects of the database: the number and diversity of the questions used by the FAQ partner libraries, and the specific resources used to answer questions.

Expansion of the Collective Database

When each of the participating FAQ partners began to develop their own database, they are given access to the complete set of questions and responses from the Penn Library knowledge bank FAQ database. The database partners then modify this set to reflect their own resources and the questions of their users. Once they make their FAQ public, the partner libraries can examine user logs to see what questions are being asked for which they can provide no answer. They can then modify their FAQ to supply sources and indexing for the unanswered questions.

Figure 1 shows the first few entries of a monthly log listing words and phrases for which there was no corresponding entry in the database. The log entries provide useful feedback on the ability of the FAQ to respond to user needs.

[1] http://datafarm.library.upenn.edu/pennlibraryfaq/faqmain.htm for links to the individual library FAQs.

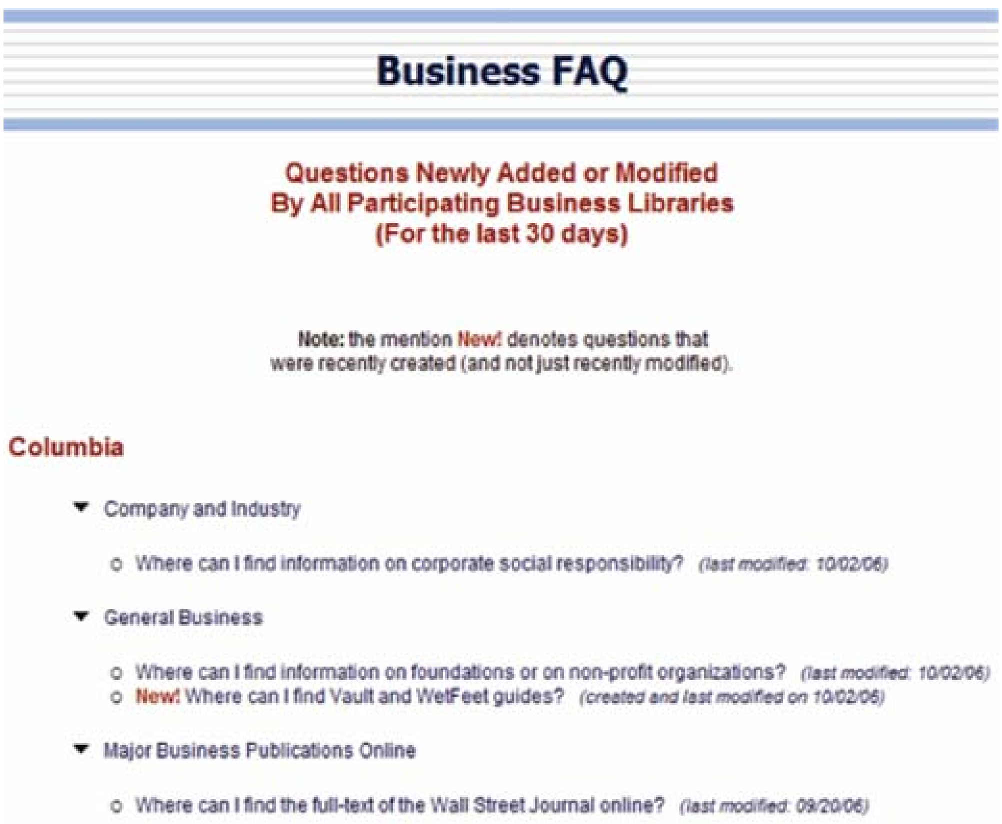
[2] Halperin, Michael, Linda Eichler, Delphine Khanna, and Kathleen Dreyer (2006). "Just the FAQs, Ma'am." *Journal of Business and Economics Librarianship.* 12(1), 33–40.

Figure 1: Log of Questions with No Corresponding FAQ Entry

Entry	Hits	Entry	Hits
20 year us bond (and)	0	court case (and)	0
CIPS study materials (and)	0	credit default swap (and)	0
Conservative Stocks (and)	0	factset (and)	0
Global Industry Analysts (and)	0	foreign firms (and)	0
Miller GAAP guide (and)	0	Harvard case (and)	0
Bloomberg certification (and)	0	hedge fund of funds (phrase)	0
bond spread (and)	0	lawsuit (and)	0
business model (and)	0	market research (phrase)	0
carrying a loss (and)	0	monthly loss (and)	0
cartoon (and)	0	Naotech (and)	0
cds spread (and)	0		

The individual FAQ libraries also receive notification when new questions are added by any of the partners, or modifications to existing questions are made. Figure 2 shows the first page of this alert.

Figure 2: Questions Added and Modified


Business FAQ

Questions Newly Added or Modified
By All Participating Business Libraries
(For the last 30 days)

Note: the mention New! denotes questions that
were recently created (and not just recently modified).

Columbia

- Company and Industry
  - Where can I find information on corporate social responsibility? (last modified: 10/02/06)
- General Business
  - Where can I find information on foundations or on non-profit organizations? (last modified: 10/02/06)
  - New! Where can I find Vault and WetFeet guides? (created and last modified on 10/02/06)
- Major Business Publications Online
  - Where can I find the full-text of the Wall Street Journal online? (last modified: 09/20/06)

We examined the individual questions listed by the ten public sites, and eliminated questions that were of local interest only. These largely included questions about process e.g. "How do I get access to the databases from off-campus". We then standardized the questions to eliminate minor variations. The result was a list of 819 questions.

A list of the questions is given in Appendix I. Although each of the FAQ partners initially had a set of the database created by the Lippincott Library, the databases that evolve have become distinct. One indication of the extensive modification made by the individual libraries is the proliferation of general subject headings used to group the FAQs. Although some of Penn's original 15 subject divisions, such as Economics, Finance, Marketing and Management continue to be used by the Partners, there have been many new subjects introduced as well as finer subdivisions of the standard subjects. Some examples include the subjects "Career," "Energy," "Health," "Real Estate," and "Law."

As Table 2 shows, more than 40% of the questions were unique to a particular library. Only 23% of the questions were used in common by six or more of the libraries. Question overlap ranged from a low of 11% (between Stanford and Princeton) to a high of 35% (between Penn and Purdue).

Table 2: Question Frequency among Libraries

Questions	Frequency	Percent	Valid Percent	Cumulative Percent
1	354	43.3	43.3	43.4
2	108	13.2	13.2	56.5
3	60	7.3	7.3	63.8
4	56	6.8	6.8	70.6
5	66	8.0	8.0	78.5
6	73	8.8	8.8	87.3
7	43	5.3	5.3	92.6
8	38	4.6	4.6	97.2
9	21	2.6	2.6	100.0
				100.0
Total	819	100.0	100.0	

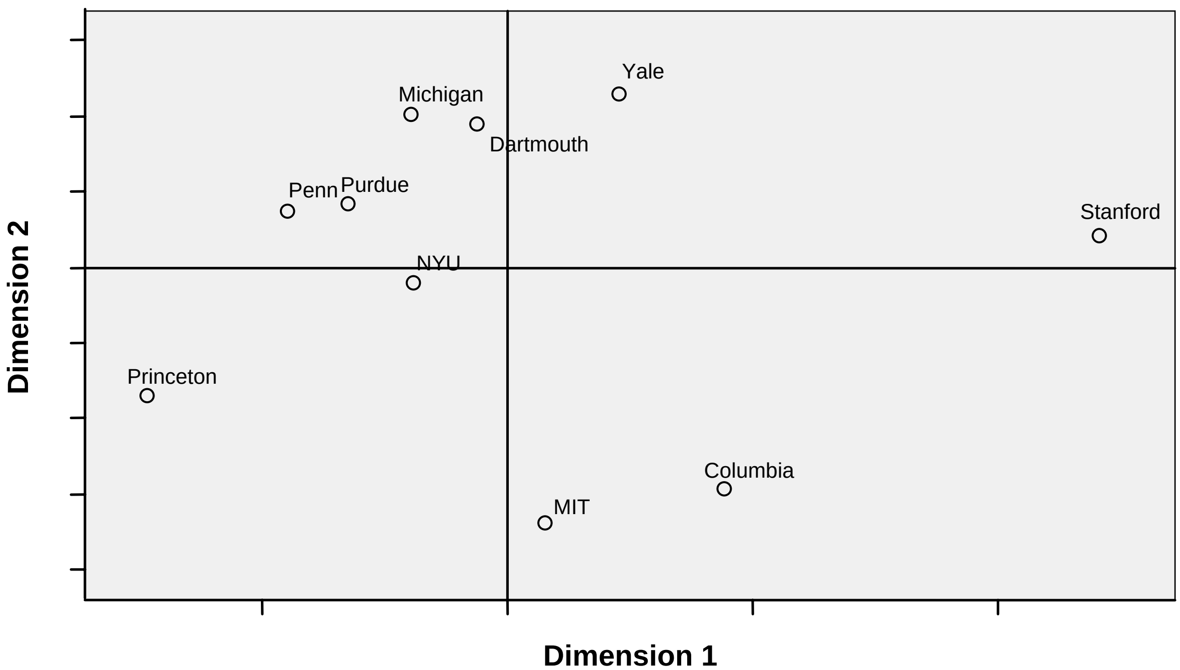
Table 3 presents this information in the form of a correlation matrix showing that the correlation coefficients (Pearson Rs) range from a low of -0.015 to a high of +0.506.

Table 3: Correlation of Question Frequency among Libraries

	Columbia	Dartmouth	Michigan	MIT	NYU	Penn	Princeton	Purdue	Stanford	Yale
Columbia	1									
Dartmouth	0.189	1								
Michigan	0.159	0.332	1							
MIT	0.179	0.170	0.170	1						
NYU	0.206	0.195	0.293	0.211	1					
Penn	0.225	0.317	0.306	0.176	0.318	1				
Princeton	0.171	0.228	0.191	0.182	0.202	0.385	1			
Purdue	0.187	0.252	0.321	0.242	0.385	0.506	0.242	1		
Stanford	0.117	0.148	0.116	0.067	0.160	0.169	-0.015	0.184	1	
Yale	0.154	0.277	0.300	0.141	0.230	0.294	0.113	0.280	0.135	1

Figure 3 below presents the correlation data of Table 3 as a multi-dimensional scale [MDS] map which organizes the variable sets into cluster groups so that they may be characterized more easily. In the following MDS graphic the horizontal or East-West axis has as it metric the association shared among the partner libraries for the with the "West" orientation indicating *more* questions in common.

Figure 3: Map of Questions by Schools



Examination of Individual Resources

To determine the range and concentration of resources used by the FAQ partners, we coded the type of resource used in each of the questions (in total 5,013 questions). We described the resource as:

1. Print
2. Commercial Database (subscription databases)
3. Free Public Database (Internet)
4. OPAC (links to the Library's own catalog)
5. Library Guides (Links to the Library's own guides)

In addition, we recorded the individual name for each of the commercial databases (a total of 207 sources).

The use of source by general type is shown below:

Commercial databases	57%
Public databases	26%
Print	10%
Library Guides	6%
OPAC	1%

There was little variation among libraries in the general pattern *of use* by type of material. Correlations between individual libraries ranged from 0.85 to 0.99 (Pearson R). These percentages are not surprising results. More business information is coming from commercial data including the vast amount of government information readily available online for the public.

Individual Commercial Database Links

The most heavily used commercial databases are given in Table 4. The percentages are calculated using the total of commercial database links (2,874).

Table 4: Commercial Databases Ranked by Number of Links

Database	Links	Percent	Database	Links	Percent
Bloomberg	432	15.03%	CCH Internet Research	56	1.95%
BSP	191	6.65%	Thomson Research	54	1.88%
ABI	161	5.60%	D&B Directory	49	1.70%
Factiva	141	4.91%	OSIRIS	44	1.53%
Lexis Academic	97	3.38%	S&P Net Advantage	42	1.46%
Thomson Analytics	83	2.89%	World Dev Indicators	38	1.32%
DataStream	80	2.78%	Business and Co resource	37	1.29%
S&P Market Insight	67	2.33%	WRDS CRSP	28	0.97%
Hoovers	64	2.23%	Business Monitor Online	27	0.94%
WRDS Compustat	59	2.05%	Econlit	26	0.90%
GMID	59	2.05%	Global Insight	26	0.90%
SDC	56	1.95%			

A complete list of commercial sources by library is given in Appendix 2. The results follow the Pareto Principle[3] that about 80% of the links were to 20% of the sources. Keep in mind that the absence of a resource does not necessarily indicate that the library does not have the resource available, but only that at the time of this study they did not use it an answer source in their FAQ.

An important purpose of the FAQs is to provide direct links to sources when reference help is not available because the reference librarian is not available or the physical library is closed. For these reasons, the types of material represented in the FAQs are skewed toward sources that are available remotely. Columbia's name for its FAQ ("Business & Economics 24/7 Help") exemplifies this aspect of the operation. In this context, Bloomberg's rank as the most heavily cited source is surprising. Bloomberg will not allow academic libraries to use its system remotely—i.e., users must search Bloomberg on dedicated computers often located in the library. Bloomberg restrictions prevent remote access by academic users and limit the ability for continuous downloading capability of data. In spite of these limitations, Bloomberg's high rank is easily explained. Bloomberg is the premier financial database and is often the exclusive source of information for a variety of esoteric financial variables. It is also a quirky and difficult system for the novice to use.

The Wharton Research Data Service (WRDS) set of databases were a heavily used resource. Subscribed to by some 150 research institutions and business schools world wide, WRDS is a WEB based interface to more than 50 numeric databases, mostly in the area of finance. 35 individual WRDS databases were linked by the FAQ libraries a total of 257 times. (http://wrds1.wharton.upenn.edu/home/about.shtml)

Unlike the use of questions among the FAQ partners, their use of commercial databases was highly correlated. As Table 5 indicates, correlation coefficients between schools ranged from a low of 0.693 to a high of 0.948 suggesting that all of the partners have a similar mix of resources.

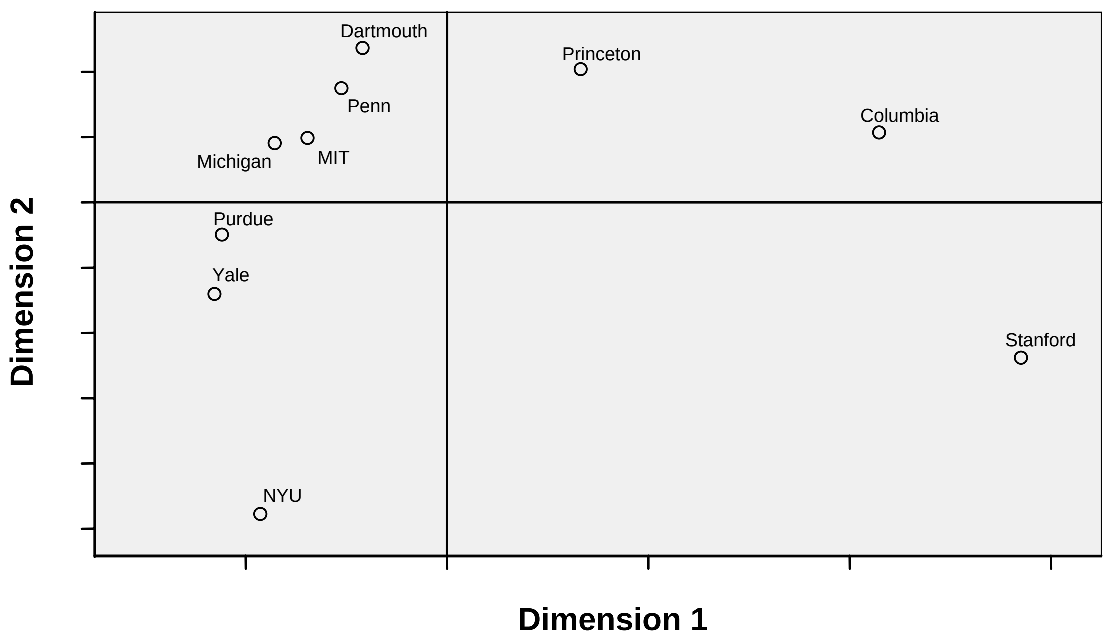
[3] Wikipedia. Pareto Principle. March 23, 2007. http://en.wikipedia.org

Table 5: Correlation of Use of Commercial Database

	Columbia	Dartmouth	Michigan	MIT	NYU	Penn	Princeton	Purdue	Stanford	Yale
Columbia	1									
Dartmouth	0.860	1								
Michigan	0.807	0.928	1							
MIT	0.822	0.922	0.948	1						
NYU	0.728	0.866	0.898	0.930	1					
Penn	0.822	0.935	0.922	0.900	0.861	1				
Princeton	0.892	0.885	0.879	0.903	0.808	0.868	1			
Purdue	0.739	0.913	0.923	0.911	0.875	0.935	0.851	1		
Stanford	0.913	0.770	0.759	0.791	0.693	0.769	0.857	0.708	1	
Yale	0.744	0.894	0.928	0.922	0.900	0.899	0.861	0.927	0.699	1

Figure 4 presents the correlation data of Table 5 as a multi-dimensional scale [MDS] map which organizes the variable sets into cluster groups so that they may more easily be characterized. In the following MDS graphic the horizontal or East-West axis has as it metric the association shared among the partner libraries for the *Commercial Data Bases* with the "West" orientation indicating *more* databases in common.

Figure 4: Map of Sources by School



Comparing the two MD scale maps (Figures 3 and 4) we see that the grouping of Penn, Purdue, Michigan and Dartmouth have essentially the same utilization profile an indication that this group of libraries have many commercial data bases as well as questions in common. The one "outlier" in both the commercial database and question association space is Stanford which is separated from the various groups because of the number of its unique questions and sources. As reported earlier, Stanford includes uncommon but useful questions within their Business FAQ.

Beyond determining what questions and resource answers to include in the Business FAQ, the libraries needed to strike a balance of using too many staff resources to maintain the knowledge database including marketing efforts, adding new questions, viewing the no hits file, creating new categories and librarians time already devoted to ongoing daily work. A survey was conducted among the 10 implemented FAQ business libraries to get a better understanding of how these things were incorporated within their library workflow. Overall, the reason for implementation most generally expressed, was a place for researchers to go for routine questions, and the ability to benefit from an expanding shared knowledge databank.

Survey of FAQ Partner Libraries

In the fall of 2006, we surveyed each of the participating FAQ business libraries to find out (1) why the library chose to implement the business FAQ, (2) how they were maintaining the knowledge database, and (3) what marketing strategies were used to promote the FAQ service. The survey consisted of several open-ended questions and librarians directly involved in the implementation and maintenance of the Business FAQ responded by a telephone interview or by email. Several of the institutions reported the Business FAQ knowledge database was a way to assist with the issue of limited reference staffing resulting from the decline of in-person reference statistics. It was also a way to reach users when the library was closed or no reference help was available. The FAQ tool was also seen as an opportunity for training new reference staff and students workers at public service or circulation desks, particularly on evenings and weekends when no reference personnel were available. Stanford reported not only entering FAQ's for common questions but for rarely asked questions topics infrequently used but important, in order to save staff time. Dartmouth reported that their MBA students made an explicit request for a Business FAQ service that would allow users to access knowledge directly. In addition, many of the academic libraries participating expressed the idea that they liked participating in a collaborative project with other like institutions with a result of providing a service users can take advantage of 24/7 via the Web. They also expressed positive comments about building a knowledge databank of shared business information that allows them to see what subject specific topics institutions are focusing on by what they add as new resources, questions, and categories. The Business FAQ is an efficient way to expand the learning opportunities for business librarianship.

Marketing Efforts

Many of the libraries are marketing the Business FAQ service through instructional sessions, library newsletters, library blogs, and search boxes on the library Web page. MIT has "branded" the Business FAQ by calling it the Dewey Research Advisor. MIT promotes the service to its Web users as a new online database developed by Dewey Library that provides starting points for specific research questions in the fields of business management and economics. According to MIT's help section of their business Web site you can find the following information:

What can I do with the Dewey Research Advisor?

- You can use it to help with research projects in business or economics.
- The DRA points you to sources which provide answers or data for specific questions--many of which have been asked before by students at MIT and other schools.
- You are mining the collective efforts of many business librarians who have found good sources for commonly asked questions.

Another important question included in the survey to business librarians was how their institutions were maintaining the FAQ "no- hits" logs. When did they enter new questions or categories into the knowledge bank, and how were they updating Web site urls that had changed particularly the resource answers using public Web sites? University of Michigan business librarians wanted to link directly to the databases within the answers of the FAQ but were concerned about the ongoing maintenance with url changes. The Business FAQ does not have a link checker so the Library worked with the business school IT department to create permanent urls to the library databases. By assigning a generic url to each database that redirected to the current url on file they were able to insert links into the FAQ that would always be updated without having to manually edit each occurrence. This was especially helpful since we have shown that 80% of the links were from 20% of the library resources.

According to the survey, most of the participating institutions think it's too early to determine the impact of the business knowledge database on reference services. They readily admit that the service has helped librarians and paraprofessional reference staff to answer business reference questions with greater confidence. Columbia specifically mentioned their 24/7 FAQ was "*a very big hit with non-business librarians.*" Some institutions are still adding content and just began to use the service in the fall 2006 semester. Once the FAQ service is in place for another year or so in all of these adopting libraries, a follow up study will be useful to determine the impact this virtual service has on overall business reference services, library training and instructional efforts.

Conclusion

Wharton Lippincott has included several other business libraries to the Business FAQ database. More time is needed to get enough data from user statistics over the next couple of years to examine the effectiveness of this new service and its correlation to all aspects of reference activity. It is clear from our first examination of the initial libraries set of questions and answers, these libraries do use a core set of resources, and indeed the 80/20 rule applies here, whether they are subscription databases, free public Web site, handouts or guides to answer common business questions. Could this FAQ service be a model that can transfer to other disciplines as well? Is it feasible for other subject specific fields (medicine or law) to create a knowledge database FAQ to share their common questions and core resources among peer libraries? Perhaps the idea of "copy reference" isn't really so far fetched after all.

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Appendices Available Upon Request

Business & Finance Division
SLA Annual Conference
Continuing Education Programs

The Business and Finance Division is pleased to offer eight continuing education courses this year at the annual conference. Whether you are interested in search strategies, management skills, or information, you will find something to help you make the most of your learning experience in Denver.

Two new courses deserve special attention—-Amelia Kassel's "Elusive U.S. Private Company Information: Sources and Search Secrets Revealed" and Peggy Garvin and Rita Vine's "Under-the-Hood Evaluation of Electronic Information Products."

The Division consistently produces some of the association's most popular courses, thanks in large part to excellent instructors including Jennifer Boettcher, Roberta Brody, Sylvia James, Cliff Perry, Lesley Robinson, and Kathleen Nichols and Judy Silverman. All of this year's instructors have planned excellent sessions that help put topics in context and provide practical, proven advice for navigating the most challenging topics in the profession.

Whether you are a new or experienced professional, we hope you will find a course to enhance your experience at this year's annual conference.

SATURDAY, JUNE 2, 2007

8:00 AM–12:00 PM

Under-the-Hood Evaluation of Electronic Information Products

The rising cost, in-your-face marketing, and ever-changing functionality of electronic resources have forced professionals to develop critical evaluation skills for these unique and essential information products. This timely course teaches professionals to put the latest products through their paces and gain confidence in selecting and recommending electronic information products that are truly worth their cost and hype.

Peggy Garvin, Garvin Information Consulting
Rita Vine, Search Portfolio Inc.

11:00 AM–3:00 PM

Business & Finance Division Board Meeting

Annual meeting of the Division's Executive and Advisory Board. B&F members are welcome to attend to see the inner workings of the division

Moderator: Hal Kirkwood, Purdue University

1:00 PM–5:00 PM

Researching Listed and Private Companies Globally

This course will address the latest challenges and issues in global listed and private company research. Coverage includes the introduction of IFRS (International Financial Reporting Standards), the EU Transparency and Prospectus Directives, the European Statute and the setting up of the CESR (Committee of European Securities Regulators) in Europe. The availability of private company information in the US from State sources and source routes for researching companies in Asia, Latin America and Central America will also be covered.

Sylvia James, Sylvia James Consultancy

9:00 PM–11:00 PM

Business & Finance Division Open House

Division Open Houses are an opportunity for existing, new, and potential members to renew acquaintances, network, learn about what the Division has to offer, and generally socialize with Division members. Join your Division colleagues and other conference attendees as we kick off the 2007 Conference!

Sponsor: Datamonitor

SUNDAY, JUNE 3, 2007

8:00 AM–12:00 PM

Back-to-Basics Business Research: Strategies, Tactics, and Sources

Business information seems to be everywhere, but is it the information we really need and does it answer our clients' questions? This course is designed to help special librarians find, evaluate, and structure the business information that is needed in their work. In addition to discussing the basic business sources and practical research tactics and strategies, it offers a framework of decisions, processes, and methods for developing answers without being overwhelmed by multiple information products and sources.

Roberta Brody, Queens College

8:00 AM–12:00 PM

Making a Business Case for the Information Center

This course will provide practical tools and strategies to help business and financial information professionals prepare a business case for their library/information centre. With diminishing or static budgets and a growing organizational focus on return on investment, there has never been a greater need for the library/information professional to articulate and justify their purpose to the organization. Participants will learn key methodologies to develop a plan and will construct plans for their own organizations, deriving immediate practical benefit.

Lesley Robinson, Lesley Robinson Consultancy Svc.

1:00 PM–5:00 PM

Elusive U.S. Private Company Information: Sources and Search Secrets Revealed

Researching company information is vitally important to business information professionals. Unlike public companies that are highly regulated, U.S. private companies are not required to file financial or other information and are not regulated, leaving fewer sources for uncovering information about them. This course is unique in that it identifies an extensive collection of sources and provides search techniques critical for piecing together information about private U.S. companies.

Amelia Kassel, Marketing Base

1:00 PM–5:00 PM

Industry Research Using U.S. Government Sources

Learn about finding industry norms and creating specific ratios for comparing your company with the industry at a national or local level. This short course will put you in command of pulling the data out of Census Bureau and other government and commercial sources. Exercises will strengthen your data presentation and interpretation skills. Discover the ins and outs of the formats available. A DVD of current Economic Census data will be included.

Jennifer Boettcher, Georgetown University

1:00 PM–5:00 PM

Mergers & Acquisitions Research: Behind the Scenes

Mergers and Acquisitions (M&A) are on the rise. Whether you are working for a buyer, seller, lender, investor, or advisor, M&A research questions are most likely crossing your desk. Are you fully prepared? This course will give you background on the industry and expose you to the key resources and research strategies you need to research a myriad of M&A-related topics with confidence.

Kathleen Nichols and Judy Silverman, KPMG, LLP

1:00 PM–5:00 PM

Private Equity Research: Tools of the Trade

Private Equity (PE) and Venture Capital (VC) play a fundamental role in providing capital to companies throughout their various stages of development. Finding information on PE and VC firms along with their investments is quite difficult given the lack of public disclosure requirements. This course will explore the inner workings and key terms of the industry along with an examination of the various data sources used to gather information on this sector on a global basis.

Cliff Perry, Warburg Pincus

SUNDAY, JUNE 3, 2007 (con't)

8:00 PM–11:00 PM

Business & Finance Division Open House

Reconnect with colleagues and spend an evening with Sam Stovall, Chief Investment Strategist for Standard & Poor's Equity Research Services. Mr. Stovall will give his annual investment presentation and then stay to chat with B&F members. An opportunity not to be missed!

Moderator: Hal Kirkwood, Purdue University

(Invitation Only—All Division members will receive an e-mail invitation)

Sponsor: Standard & Poor's

MONDAY, JUNE 4, 2007

7:00 AM–8:30 AM

Business & Finance Division Breakfast and Business Meeting

Participate in the governance of the B&F Division! Come meet the Executive and Advisory Boards. Participate in the governance of the Division. Network with colleagues after the Business Meeting activities.

Ticketed Event: #535 ($20.00)

Sponsor: Alacra

11:30 AM–1:00 PM

The Mobility of Business Information

The development of a growing array of technological applications is changing the face of business. E-business is becoming M-business as information now becomes as mobile as the people who use it. The panel represents power users of mobile business applications.

Roger Strouse, Outsell

Stephen Hayes, University of Notre Dame

Chris Poehlmann, University of Notre Dame

Sponsor: LexisNexis

1:30 PM–3:00 PM

Emerging Markets Intelligence Resources

This session will provide attendees with an overview of useful information resources covering emerging markets, the industries that are present, and companies participating in them. These resources may be academics, journalists, governments, international and regional NGOs, and commercial entities. This statistical data, news, and commentary contribute to a portrait of these promising markets, allowing you to perform analyses and draw your own conclusions as to their prospects for the future.

Moderator: Dr. Irene Wormell, Informatiker Konsult AB

Speakers: Gloria Reyes, Reyes Consulting

Dr. Adeline du Toit, University of Johannesburg

Sponsor: IEEE and ISI Emerging Markets

1:30 PM–3:00 PM

Vendor Licensing: Tackling the Contract and Budgeting Monster

Feeling daunted? Don't be—specialists in buying and in tracking licensing data offer insights and tips for anyone responsible for buying/administering/paying for content licenses to help you simplify management of the content license, ensure compliance, and deal with inevitable price increases to your own advantage. Spend 90 minutes with the experts and save agony and midnight oil!

Moderator: Shelly Edwards, Donohue Group, Inc.

Speakers: Armand Brevig, AstraZeneca, UK
Joanie Olivier, Iconitel, Inc.

Sponsor: Elsevier

MONDAY, JUNE 4, 2007 (con't)

4:00 PM–5:30 PM

Content Buyers Roundtable

Your chance to speak up and hear what colleagues—and vendors—have to say. The session is yours to take where you want it. Raise questions, learn what others have learned, come away with contacts who have solved (or face) the same challenges you do. A past-conference favorite—come prepared to contribute and discuss! At member request, we will label tables for content areas such as financial, scientific, etc so as to enable attendees with similar concerns to sit together. Three "moderators" are available for tables desiring their facilitation/participation.

Moderators: Shelly Edwards, Consultant, Donohue Group, Inc.
Amy Crawford, Electronic Resources Manager, OCLC Western Service Center
Armand Brevig, Global Buyer, AstraZeneca, UK

4:00 PM–5:30 PM

Speed Dating with B&F Division Sponsors

Hear short presentations from a group of the Division's sponsors about how they are using new technologies to meet your needs—then meet up with them for a second date on the exhibit floor!

Moderator: Ann Cullen, Harvard University

Vendors:	Standard & Poor's	OneSource
	Datamonitor	LexisNexis
	Dow Jones & Company	Copyright Clearance Center
	Alacra	10K Wizard

5:30 PM–8:00 PM

Business & Finance Division Awards Reception

Come enjoy food and drink at the B&F Awards Reception where we recognize the best the division has to offer. Awards include the Outstanding Achievement Award, Distinguished Member Award, International Travel Award, International Student Award, and the Centers of Excellence Awards.

Moderator: Toby Pearlstein, Bain and Company

Speakers: Sylvia James, Sylvia James Consultancy
Leslie Reynolds, Texas A & M University
Awilda Reyes, West Chester University
Robert Clarke, Trent University

Sponsor: OneSource Information Services, Inc

TUESDAY, JUNE 5, 2007

7:00 AM–8:30 AM

B&F Corporate Information Centers Section Breakfast
Managing a Complex, Virtual Research Organization

Breakfast meeting for the Corporate Information Centers Section. What are the advantages and challenges of operating virtually? What works and doesn't work when your team is in different cities and countries, in home offices and company offices, working specific time zone hours and working schedules of their own choosing? Whether you are a manager in a similar situation or an information specialist seeking to understand the everyday reality of one workstyle option, you'll walk out of this presentation and the following discussion with some idea of the practicality of it all.

Moderator: Cynthia Lesky, Threshold Information, Inc

Speaker: Sue Cronizer, Computer Sciences Corp.

Ticketed Event: #660 ($15.00)

Sponsor: Global Insights

TUESDAY, JUNE 5, 2007 (con't)

7:00 AM–8:30 AM

B&F Financial Services Section Breakfast
Financial Education Resources

Breakfast meeting for the Financial Services Section. Enjoy breakfast with colleagues and hear a presentation on financial education from an economist from the Denver office of the Federal Reserve Board.

Moderator: Adrienne Ballew, Mortgage Guaranty Insurance Corporation

Speaker: Rachel Saucier, Research Economist, Federal Reserve Board

Ticketed Event: #630 ($15.00)

Sponsors: Prenax, Inc and Standard & Poor's

7:00 AM–8:30 AM

B&F Private Equity Section Breakfast
Venture Capital & Private Equity Fundraising

Breakfast meeting for the Private Equity Section. Hear about notable deals and trends in Europe, China and the United States. Discuss Private Equity compensation trends.

Moderator: Cliff Perry, Warburg Pincus

Speaker: Vince Meza, Dow Jones VentureOne

Ticketed Event: #665 ($15.00)

Sponsors: Dow Jones & Company

7:00 AM–8:30 AM

B&F College & University Business Librarians Section Breakfast

Trends in Community Outreach

Breakfast meeting for the College & University Business Librarians Section. Speakers will discuss trends in community outreach. Specific topics include supporting a fee-based information service; the creation of a FAQ database for collaborative reference service among academic business libraries; and the developing need to support technology commercialization initiatives.

Moderator: Carissa Holler, Business & Finance Information Librarian,
University of Illinois at Urbana-Champaign

Speakers: Rahn Huber, Business Information Services Manager, Vanderbilt University

Karen MacDonald, Business Reference Librarian, Texas A&M University

Therese Terry, Reference Librarian, University of Pennsylvania

Ticketed Event: #625)$15.00)

Sponsors: ProQuest

9:00 AM–10:30 AM

Dream Jobs of the Future

This session continues the B&F Division's recurring series on career development. Nontraditional information professional jobs are sprouting up all over. This group will discuss new and upcoming information professional jobs and the skills to remain relevant in the twenty-first century.

Moderator: Stephen Kochoff, Basch Subscriptions Inc.

Speakers: Diane Goldstein, Diane M. Goldstein & Associates

Dr. Hazel Hall, Napier University Edinburgh

Margaret Bennett, Pro-Libra

Jack Plunkett, CEO & Publisher, Plunkett Research, Ltd

Sponsors: Dow Jones & Company

TUESDAY, JUNE 5, 2007 (con't)

11:00 AM–12:30 PM

XBRL: Extensible Business Reporting Language

XBRL is a language for e-communication of business & financial data. Find out what it is, who's using it, and how it will impact your future as a business information professional.

Moderator: Rita Ormsby, Baruch College

Speakers: Louise Klusek, Baruch College

Courtney Cowgill, Oceanic Exploration Co.

Rita Ormsby, Baruch College

Sponsor: InfoCurrent

2:30 PM–4:00 PM

Mining Your Own Information Backyard for Economic Growth and Development

A panel of economic research experts will present case studies on specific problems and solutions for finding information for local economic development.

Moderator: Kara Masciangelo, Federal Reserve Bank of New York

Speakers: Anne Northcott, Export Development Canada

Jenny Shangraw, The Right Place, Inc

Christine Hamilton-Pennell, City of Littleton, CO

Sponsors: 10-K Wizard and Thomson Dialog

5:30 PM–8:00 PM

Business & Finance Division Open House

Celebrate the accomplishments of your B&F colleagues at the Authors & Instructors Open House Reception. The B&F Bibliography will be distributed.

Moderator(s): Monica Kirkwood, Purdue University

Sponsor: 10-K Wizard Technology

WEDNESDAY, JUNE 6, 2007

7:00 AM–8:30 AM

Value-added Industry Research

An understanding of an industry's past and present value is fundamental to developing reasonable expectations about the industry's future. Key variables to determining the value of an industry come from business valuation methodologies by the Internal Revenue Service and the US legal system. Learn how to use these highly regarded methodologies to determine an industry's value. 4-5 copies of Valuing a Business: the Appraisal of Closely Held Businesses will be given away to selected attendees.

Speaker: Vicky Platt, Willamette Management Associates

Ticketed Event: #800 ($10.00)

Sponsor: Thomson Financial

11:00 AM–12:30 PM

The Facets of Digital Rights Management

In what is sure to be an interesting dialog on digital rights management; a panel of experts will discuss the different facets of digital rights management, where it is now, and where it's going.

Moderator: M. Rita Costello, UCLA–Rosenfeld Management Library

Speakers: Karen Coyle

Bill Burger, Copyright Clearance Center

Ed Keating, Software & Information Industry Association

Sponsors: Copyright Clearance Center

WEDNESDAY, JUNE 6, 2007 (con't)

11:00 AM–12:30 PM

Visualizing Statistics: Making Use and Sense of Graphs, Charts, and Diagrams

An introduction to the benefits of using graphs, charts and diagrams as a method to visually convey statistical data. Learn techniques that help convey ideas and build common understanding of complex data.

Speaker: Elana Broch, Princeton University

1:00 PM–2:30 PM

Centers of Excellence Winners Revisited

A panel of past Centers of Excellence Award winners are brought together to discuss how they leveraged the award for additional benefits & marketing internally and externally.

Moderator: Leslie Reynolds, Texas A & M University

Speakers: Susan Fifer Canby, National Geographic Society

Marcia Schemper-Carlock, Verizon

Cindy Romaine, Nike

Timothy Green, Ernst & Young

Sponsor: Plunkett Research Ltd

3:00 PM–4:30 PM

How Tomorrow's Technologies Can Help Us Today

CI professionals use intelligent bots for information discovery and harvesting from the web, intelligent navigation of the web, text extraction and analytics, and content mining. This session will highlight new tools that assist in data transformation, automated summarization, decision support, predictive modeling/scoring, delivery of business intelligence to handheld devices, and tools that respect privacy and ownership issues while allowing for shared search.

Moderator: Barbie E. Keiser, Barbie E. Keiser, Inc.

Speakers: J. P. Sherman, Wazap

Randy Marcinko, Marcinko Enterprises

Sponsor: Ipreo

THURSDAY, JUNE 7, 2007

7:30 AM–11:30 AM

Tour: The Capitol and the Coins

Located in the heart of Denver's Civic Center, the Denver Mint is an integral part of our nation's operations, as well as a very interesting place to visit! Touring the United States Mint is a fascinating experience for those of all ages and one that will be remembered for a lifetime. The walk tours cover both the present state of coin manufacturing as well as the history of the Mint. Learn about the craftsmanship required at all stages of the minting process, from the original designs and sculptures, to the actual striking of the coins. Your adventure will include a visit to Colorado's spectacular capitol building in the heart of the city. Modeled after our nation's capitol, the dome is leafed with gold and the steps at the front of the building feature an official altitude marker where you can stand and be exactly one "Mile" High! Tour Registration http://www.sla.org/content/Events/conference/ac2007/registration/tours.cfm

Ticketed Event

Hal Kirkwood
Chair

Miguel Figueroa
Director/Professional Development Chair

Conference Awards

Business & Finance Division
Awards Reception

Monday, June 4, 2007 5:30 PM–8:00 PM

Join Division members and colleagues as we present this year's award winners:

- B&F Division Award for Outstanding Achievement in Business Librarianship sponsored by BNA, Inc. (announced by Toby Pearlstein)
- B&F Division Distinguished Member Award sponsored by SkyMinder (announced by Toby Pearlstein)
- Centers of Excellence (announced by Leslie Reynolds)
- International Travel Award sponsored by ISI Emerging Markets (announced by Robert Clarke)
- B&F Division/European Chapter Student Award sponsored by Books 24x7 (announced by Rachel Kolsky and Sylvia James)
- Student Stipends (announced by Awilda Reyes)

Enjoy the presentations and hear from our winners then celebrate with us at a reception in their honor.

Audiences: All attendees

Moderator(s): Hal Kirkwood, Associate Professor, Purdue University

Sponsored by OneSource Information Services Inc. an InfoUSA Company

Toby Pearlstein
Toby.pearlstein@bain.com

Business & Finance Division
Centers of Excellence Awards

Want to see what some of the best Business & Finance special libraries are doing? Come to the B&F Division Awards reception and learn about quality, innovation and excellence.

The Business & Finance Division of the Special Libraries Association (SLA) encourages you to attend the sixth annual "Centers of Excellence" Awards at the SLA Annual Conference in June 2007. The awards recognize quality as a priority for successful management, service and delivery of information. The presentation of these awards will be at the Business and Finance Division Awards Reception 5:30–8:00 Monday evening, June 4, 2007.

The awards take their inspiration from the Malcolm Baldrige National Quality Awards, which are given annually to U.S. organizations to recognize and promote quality as a critical part of innovation and competitiveness. The "Centers of Excellence" Awards, like the Baldrige Award, recognize customer driven quality and leadership within the framework of an organization dedicated to gathering, analysis and dissemination of information within the business community. The awards serve to recognize the best of "best practices" in three categories: Service, Management, and Technology. Any Member of the Business & Finance Division can apply for their organization for consideration in any of the three categories.

A distinguished panel of judges evaluates all entries. There may be as many as three winners who represent excellence and quality at its highest level. Judges names will remain confidential until after the review of each entry is completed. Leslie Reynolds does not serve as a judge.

To apply for the 2008 Business & Finance Centers of Excellence Awards, please see the application guidelines on the B&F Division Web site (http://www.slabf.org). If your organization is a Center of Excellence, please consider applying to:

Leslie Reynolds, Associate Professor
5001 TAMU
West Campus Business Library
College Station, TX 77843-5001
Attn: COEA
Or by e-mail (preferred): leslie.reynolds@tamu.edu

Leslie Reynolds
Chair, Centers of Excellence Awards Committee

Talking Business Information
Cynthia Lenox

Conversations With Judy Field

CL: You have had a distinguished career in business and finance librarianship so far. Please summarize your career for our readers, including your many professional awards.

JF: The short version of the story of my varied professional career is I have worked in government libraries. I am now a senior lecturer in the Library and Information Science Program at Wayne State University in Michigan, and still do work as a management consultant. I have built two libraries and developed and supervised the reorganization of four libraries. Some recent awards are the 2000 Wayne State University, University Libraries Purdy Award, the 2001 SLA's Rose Vormelker Award (for mentoring), the 2002 SLA's President's Award (for chairing a task force on the conference), the 2002 SLA Michigan Chapter Distinguished Member Award, the 2005 SLA's Western Michigan–Upper Peninsular Chapter Alberta Brown Award (named after the 1957–58 SLA president), and the 2006 SLA's John Cotton Dana Award.

CL: What advice can you share with special librarians who hope to achieve recognition at this level?

JF: To achieve recognition in your job, an information professional needs to do quality work, delivered in a timely manner, and be seen as a team player. To be honored by your peers in a professional association means that you not only volunteered to do something for your unit, but that you delivered it when asked for, that you fully participated and others were able to rely on you, and that you were willing to do this whether as a member of a committee or as the chair. Being active in an association requires time, dedication to accomplishing the task, and the willingness to serve in any capacity. The key word is volunteer and volunteer again! This is also an important way to expand your network of colleagues and to develop leadership skills.

CL: Who influenced you the most and how? Did you have any mentors?

JF: After I had been working for a few years, I was feeling disillusioned about the profession and my perception of whether I really knew what the information profession was all about. Then I went to the Boston conference and heard Rosabeth Moss Kanter talk about "change masters." Her presentation caused me to look at the profession entirely different. I stopped listening to the "whine masters" and the "can't masters" and refocused myself on where I thought the profession and information professionals should go. I have never looked back.

I have had many professional mentors during my career and I met most of them in SLA. For example, one of my early mentors was Shirley Echelman, who was SLA president in 1977–78 and B&F chair in 1971–72, as well as an active member of the New York chapter. She was at Chemical Bank and went on to become executive director of the Medical Library Association and later the Association of Research Libraries. Another was Frank Spaulding, who worked at Bell Laboratories and was SLA president in 1986–87. He created the Task Force on the Value of the Information Professional. More recent SLA mentors were Jane Dysart, Stephen Abram and others. I have been blessed with meeting people who saw the glass as half full.

CL: How important have professional associations (especially SLA and B&F) been in your career? ➻

JF: Very early in my career, I was asked to work with Shirley Echelman on a B&F project when she became chair-elect then chair. I followed her as chair-elect and chair. This was while I was still getting my feet wet as a professional and it was the start of my very long involvement with SLA on all levels. When I was made chair of the Education Committee, this started an involvement with ALA that eventually led to my being appointed to the Committee on Accreditation. I have also been involved for several years with ASSIST and now IFLA, where I am chair of the Knowledge Management Section.

I have used my professional associations to keep me current with issues in the profession and to develop an extensive network of colleagues, many of whom have become close friends. I feel my career would have been much different if B&F had not asked me to get involved.

CL: What career accomplishments are you most proud of?

JF: I have had many accomplishments, but the ones I am now taking great pride in is the success of my former students, such as Gary Price, who was my research assistant. This was an unexpected benefit from teaching.

CL: Do you have any guiding principles that you have followed in your career?

JF: My first principle was that what information professionals need is good management strategies, which is why, as an undergraduate; I earned a Bachelors in Business Administration. I also have a MLS and an MBA. The second principle is that there is nothing that we cannot achieve as long as we define ourselves and do not let others do it for us.

CL: In what direction would you like special librarianship to evolve?

JF: I want the professional to have a holistic view of itself, a "one of all and all for one" spirit. Too many times we speak for the minutia, the importance of which is lost on our administration. We need to speak in a more unified voice and to be seen as the source of quality information, and to get our voice out. We need to share success stories; we have a lot of success to share. I want us to be the "Just Do It" Association.

CL: Is there something in particular you would really like to do in your career or in life?

JF: I have had a very rich career where my peers have already honored me more than once. The legacy I would like to leave is that I was a good and faithful mentor. Personally, I want to win a major backgammon tournament. When I retire, I plan on getting my "A" game ready to take on the "big boys."

Cynthia Lenox John Carroll University
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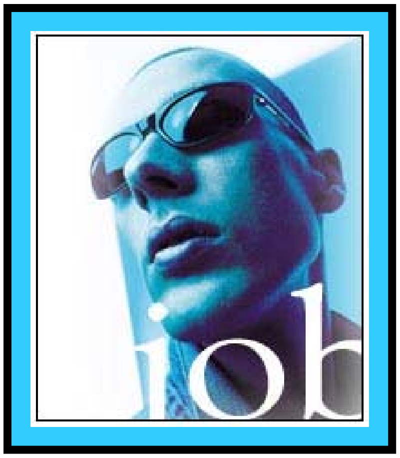

On the Job

Sylvia R. M. James

CAREERS, JOBS, RECRUITMENT, & LIFE IN THE BUSINESS & FINANCE WORLD 13

Market Research for Small Businesses

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

As I have mentioned several times in this column, your first and most significant clients in a new business are more than likely to be your immediate former employers. This has the great advantage of providing a buffer zone between the two worlds of employed and self-employment, as well as a good start and boost of confidence. But what happens if you are a new small research business that can't offer a service to your old employers and you need to do some market research for your first business plan to get yourself underway?

Quite apart from an external requirement to do market research on your business ideas for any investor, the benefits of doing good market research are well-known for any small business. These range from finding hidden niches for new business opportunities and preserving capital to those of building customer loyalty and identifying more business opportunities with existing customers. I think it is worth going through these fundamentals for the new business and finance entrepreneur and this will be the subject of these next couple of On the Job columns.

But where to start ? This conundrum had been put to me by my local Women in Business Group, who had asked me to give a short lunchtime presentation last fall on the basics of market research. A few weeks ago I followed it up with a second on a more specific theme of creating lists from market research of potential new businesses. From the start I knew that this would mean adapting tried and tested market research methods for small business developers, most of whom, in this particular local group, were actually sole traders.

At first I thought it would be a very easy presentation to give. I could always go through my methods of doing market research for my business, which I developed in the first few years of being in business. But, I had to remember I was a business research professional and it was ingrained in me to do research for any aspect of my business, especially market research, and I soon came to the conclusion that this would not be easy to condense into an entertaining, short, after-lunch talk. It was also not easy to adapt the methods that I use for much larger businesses since I do primary and secondary market research projects as part of my services. So, I did a lot of basic background research into what was available for small business and was not very impressed with what was available.

Market research as such, even though it is acknowledged as vital, is not really commonly offered as advice from all the many agencies and professional firms aimed at very small businesses and start-ups. The advice (if any was available and described as such) offered by government agencies (bodies such as chambers of commerce), trade associations, and companies seemed very anodyne and prescriptive. There was certainly not the wide discussion of well thought out research methodology and data collection that would help a small business develop its market, acquire new business, or be used to create a business plan.

These advisers are also not the most usual places that employ experienced and qualified business and finance information professionals, even though there is a very clearly perceived need for small businesses to have good information at all stages to grow and develop. So, here in my investigation itself, I had unwittingly discovered one of those great niche opportunities for business and finance information professionals stating ➺

new businesses. Why not link up with any company or organization in your area to provide small business market research?

I then realized that it has only been during the last few years that I have worked on research projects for really small businesses, mainly through local advisory firms such as accountants, lawyers, and business angels. When I had worked with these clients I had adapted my market research skills, sources, and results to suit the occasion without really appreciating how different the work was.

What points did I make in my first presentation? After explaining what market research is and what the benefits are, I explained what primary and secondary market research is and how methods and data are developed. Then I looked at the steps you might take to develop a simple market research project, especially emphasizing developing new business as many of the audience were new to self-employment and had yet to get fully underway. I must admit that my first question on how to develop market research for a one-woman dog walking business took me aback to start with. I had talked about customizing market research methods for small businesses in abstract. She needed real chapter and verse about how to do market research that would work for her. There was going to be no market research report on the Web that could be used to help that type of business. This is where the idea for a second presentation on the problems and practicalities of creating lists of potential new business contacts from market research came from. I'll cover this presentation in my next column.

For a follow up, I sent the group a copy of my slides and a short bibliography of interesting books to read and some Internet sites that might prove useful. If any reader of the B&F *Bulletin* would like a copy, please e-mail me. When working with small businesses, adapting your business and finance research skills could be the very first idea for a new business in your new, self-employed life.

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Out of the Box

Deborah A. Liptak

Introduction to Beyond WorldCat: Where to Search: Strategies for Finding That Elusive Item

I was asked to prepare a short panel presentation for the Texas Library Association (TLA) (http://www.txla.org/) Interlibrary Loan (ILL) & Resource Sharing Roundtable (http://www.txla.org/groups/illrt/illrthome.html) to be presented on Friday, April 13, 2007, at TLA's 2007 convention (http://www.txla.org/conference/conf.html) in San Antonio, Texas, with panelists Kate Cordts, interlibrary loan manager, San Antonio Public Library (http://www.sanantonio.gov/library/) and Catherine Hamer, document delivery librarian, The University of Texas at Austin (http://www.lib.utexas.edu/services/ils/).

TexNet Interlibrary Loan (http://www.tsl.state.tx.us/ill/) is a statewide interlibrary loan network including academic, public, and special libraries throughout Texas. TexNet is managed by the Texas State Library and Archives Commission (http://www.tsl.state.tx.us/). The ten TexNet Interlibrary Loan Centers, nine in large public libraries and one at the State Library and Archives Commission, provide interlibrary loan and Online Computer Library Center (OCLC) referral service for smaller, non-OCLC member libraries in their service region. TexNet Interlibrary Loan Centers also loan materials to other libraries throughout Texas and the world.

The topic, "Beyond WorldCat: Where to Search: Strategies for Finding That Elusive Item," presented tips for interlibrary loan librarians on what do you do when you can't find an item on WorldCat. Each panelist presented information from a different perspective, allowing for a diversity of challenges and solutions.

Kate Cordts talked about strategies for public libraries, especially regarding genealogy requests. Most public library customers tend to order items available through WorldCat, with the exception of genealogy. Her suggestions included: Mid-Continent and St. Louis Public Libraries; UT Austin and Texas A&M Academic Libraries; State Libraries and Historical Associations such as the State Historical Society of Missouri, the New England Historical Genealogical Society, the Minnesota Historical Society, the National Genealogical Society, and Societies in North Dakota and Kansas; the National Archives and Records Administration (NARA); and Canadian and UK resources. If the requested item is not owned by a WorldCat library, Ms. Cordts suggested checking Google, Amazon.com, out of print sources, and Listserves.

My portion of the presentation concentrated on locating documents from the independent entrepreneur's viewpoint rather than from the perspective of an interlibrary loan librarian. I interviewed a few ILL librarians in the Dallas–Fort Worth metroplex, asking them what type of requests they were not able to fill: foreign language dictionaries, medical documents, conference papers, reports, patents, videos, reference materials, legal materials, soft cover books, and theses and dissertations. Not many articles are written on this topic, but what these librarians told me collaborated precisely with the available literature.

The ***TLA Interlibrary Loan PPT Presentation*** is available at: http://www.debsinfo2go.us/contact/Beyond_WorldCat.ppt as well as a list of ***TLA Interlibrary Loan Resources.*** http://www.debsinfo2go.us/contact/TLA-ILL.pdf was used to prepare the presentation.

Deborah A. Liptak deb@debsinfo2go.us
http://www.debsinfo2go.us

Connections
John Ganly

Nine Assumptions for the Future

Projections are the meat and potatoes of business information work—and apparently the broader community of librarians is getting into the act. At the annual conference of the Association of College and Research Libraries (ACRL) this spring a list of the top nine assumptions for the future of academic libraries was presented. It becomes clear from the roster that librarians, no matter their venue, see the future in much the same manner.

The complete list can be viewed on the ACRL Web site, but the following seem particularly relevant to B&F interests:

1. There will be an increased emphasis on digitizing collections, preserving digital archives, and improving methods of data storage and retrieval.

How many of us who have been co-opted into records management responsibilities are nodding in agreement?

2. Not relevant.
3. Students and faculty will increasingly demand faster and greater access to services.

This has been the mission of B&F professionals from the dawn of time and the electronic universe has upped the ante.

4. Debates about intellectual property will become increasingly common in higher education.

We may find ourselves on both sides of the debate in regard to protection of commercial interests and demand for access.

5. Demand for technology related services will grow and require additional funding.

When has this not been the case—-past, present, or future?

6. Higher education will increasingly view the institution as a business.

The cost center concept and how to deal with it has been and will be B&F territory.

7. Students will increasingly view themselves as customers and consumers expecting high quality facilities and services.

We would probably ask what they have been considering themselves in the past.

8. Free public access to information stemming from publicly funded research will continue to grow.

I asked myself what planet the person who made this assumption was living on.

9. Privacy will continue to be an important issue in librarianship.

In the B&F world this assumption might be challenged by outsourcing and its implications.

It might be fun to see what the B&F member assumptions would be.

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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.

SPECIAL LIBRARIES ASSOCIATION **BUSINESS & FINANCE DIVISION**
EXECUTIVE & ADVISORY BOARDS MEETING **SPARKS, NEVADA, JA NUGGET CASINO RESORT**
SATURDAY, JANUARY 27, 2007, 9:10 AM–12:10 PM

Minutes

Presiding: Hal Kirkwood

Attending: Toby Pearlstein, Terri Brooks, Gayle Gossen, Sylvia James, Cris Kinghorn, Cynthia Lesky, Brent Mai, Glenn McGuigan, Amy Affelt, Karen MacDonald, Leslie Reynolds, Monica Kirkwood, Rachel Kosky

1. Call to Order (TP)
   - Toby called the meeting to order at 9:10 AM.
2. Passing of the Gavel (TP to HK)
   - Hal presents Toby with a gift of thanks.
3. Introductions
4. Approval of Agenda
   - Add real estate to new business. Move awards to end of agenda so that Sylvia can present after she returns from board meeting.
5. Baltimore Minutes
   - The minutes of the June meeting in Baltimore were accepted as tabled.
6. Report of the Chair
   - Hal reports Denver is progressing. 18 sessions. 2 issues: vendors and speakers.
   - Hal reports difficulty making contact with vendors and having them return calls. Some vendors are not sponsoring anything or exhibiting this year (Datamonitor, Snap Data, PriceWaterhouseCoopers). Toby will approach Datamonitor. S&P will sponsor Sunday night open house (Sam Stoval presentation) with martini bar.
   - 2-3 sessions need additional speakers so Hal will put out call to discussion list. Gayle had speakers in mind and Cynthia said she would place a request on the AIIP discussion list.
   - We are partnering with LMD (needs $1,500 sponsor) and CI (needs $1,500 sponsor) and Solo (we're lead and Solo is not defraying any cost as we have a full sponsor). Toby will approach ISI.
   - Hal plans to update the Division via discussion list and letter on Web site.
   - Toby asked for a contact at Carol Publishing.
   - We have extensive sessions on Wednesday and a tour on Thursday to Denver Capital Building and Denver Mint. SLA HQ asked divisions to keep programming heavy so that people stay past Wednesday keynote. Toby wonders if any vendors have anything planned for Wednesday night. Working with SLA to film COE past award winner session for future marketing.
7. Finance Report (TB)

   2006 Finances
   - Un-bundled advertising with sponsorship (priced ads according rate sheet even though we didn't collect that money as it was bundled in with sponsorship).
   - CE courses under budget because we budgeted for eight, some were canceled and an instructor was sick.
   - Interest higher than budget because the Treasurers complained about pooled fund and SLA re-evaluated and gave an increased rate of return which basically matches Wachovia.

Motion: Terri will monitor pooled rate fund as she is not in a hurry to move money out of pooled fund due to increased rate of return. Passed.

- *Bulletin* expenses came down significantly.
- CE courses expenses less because they were fewer.
- Networking (open houses) budget based on Toronto spend but we spent more in Baltimore due to generous vendor sponsorship.
- Budgeted $13K surplus and ended up with $15K surplus.
- Toby asked if we gave the students the $25 gift certificates. Terri and Hal did not know but suspect we did not and feel that it is too late to do so now. We do not know what students actually did work. We will no longer offer gift certificates to students.

2007 Draft Budget

- Allotment will be slightly less than draft budget—Terri will adjust for approved budget to reflect actual amount.
- Terri asked if we should budget less for vendors due to Hal's recent experience. Gayle pointed out the vendor's budget year has likely not been set and that it will come in during February. Hal said that when it does come in, the amounts are generous.
- 8 CE courses are approved so Terri budgeted for 5 to account for cancellations.
- SLA Europe will do certificate for joint SLA Europe award. It will be framed.
- Decision to keep Wednesday board meeting if we need to but without catering. Catering budget will decrease.
- Division suite will remain. Hal is planning it. Terri will add $2,000 for the suite in case Purdue can't cover it.
- Toby asked if 2006 expenses that were contested with HQ were paid. Terri reported they were. We were charged for A/V for the open houses but credited for one that did not show up. Toby tells Hal to watch out for that in Denver.
- Sylvia James arrives at 9:55 AM.
- Terri does not have to file a mid-year report any longer.
- With revisions to the draft budget, it appears as though we will have a budget surplus of about $5,000.

Motion: Accept the budget as amended. Passed.

8. Membership (AA)

- Amy would like suggestions on how to increase membership. She wants to re-do brochure and have it ready for June. She will remind other Division members that they can join more than one division. She wants suggestions on value statement for B&F.
- Last year, Cris contacted people without a division selected via email. Cynthia pointed out that emails may not pass through spam filters. Sylvia thinks we are missing the value-add of sections and they should be included in our marketing material.

Motion: The board directs each section coordinator to find up to 20 potential members and to contact them to talk about SLA and report back in Denver. Passed.

- Cynthia suggests advertising through chapter meetings. Hal thought we should target the schools with the business info course. Toby thought we could approach the SLA student reps and ask them for support. Hal suggested involving one of our student volunteers to help.

Motion: Ask the membership chair to reach out to schools to seek opportunities to market B&F Division. Passed.

9. Seattle Conference Planning (CK)

- Mary Ellen Bates provided a list of potential topics for consideration. Cris will find out what her speaking fee is.
- David Adler, Moody's offered to speak.

- Joe James connection—dream job follow-up.
- Co-sponsor with Environment on China and environment.
- Note Seattle is later than usual. Date is July 27–30, 2008.
- Cris will send around ideas from last night and get to work.

10. Old Business

Baltimore Report (TP)

- Summary of Division Awards (SJ)—All awards progressing. Seeking additional nominations for Distinguished Member (long service), Outstanding Achievement (past year). Hal suggested Boeing librarian who just retired and will let Toby know. Question rose if we can give 2 awards which Toby verified we have done in the past. Terri would need to be notified for budget purposes. Bob needs to provide update on the SLA Europe/B&F award. Sylvia suggests that we have Awilda take international winner under her wing with other stipend winners. Toby likes the opportunity of this award to partner with a Chapter. There are 8 nominations to consider.
- Toby presented Miguel's question about the late payment to CE courses. Terri said it is a complicated formula and it should get faster.

Motion: Amend the CE contract to include language that the Division is not responsible for the expedition of payment to instructors should payment be delayed 3-4 months. Passed.

Section Reports (HK/TP)

Bulletin—Vicky wants to table renaming and mission statement until Denver. Board approved. Hal will check that she has enough copy for upcoming editions. She needs to come back to us regarding EBSCO subscriptions—who and how still needs to be answered. Terri believes there are three people who subscribe through EBSCO. Terri pointed out the photos are not clear in electronic copy.

Motion: The *Bulletin* editor to include a teaser message with table of contents and article summary and sponsor/advertiser information. Passed.

- Hal will tell Vicky to contact Chris Olsen for high resolution logo.
- Peer review comments in Vicky's report questioned as to what that means. Are we looking for peer reviewers? Terri asks if we need to develop guidelines for peer reviews. Hal said it must already exist. Toby suggests that we go outside the board to find peer review volunteers. Toby said we can advertise to CUBL and Leslie pointed out we need to market that service to academic members.
- Vendor relations/ad manager stipend winner may step in and take process forward.

Publications (CL)—Now on e-mail to avoid spam filters and make it easier to pass to incoming chairs. Threshold will continue to sponsor and their ad goes on backcover.

Web Site Design—Motion: Board to approve, in principle, the redesign of the Web site with horizontal navigation for board approval as soon as is convenient. Passed.

- Brent also wants to change the logo which will be tabled until Denver. Web site redesign in the priority.
- There is no longer a disadvantage for moving the Web site host to SLA. We will keep the slabf.org domain and auto redirect to new site.

Motion: The Web site is to move to the SLA hosted site. Passed.

- Sylvia questions if we should start to raise vendor sponsorship for Web site as it is a successful revenue stream for SLA Europe. Hal suggested we table that until the redesign is complete.

B&F Blog (HK)—Should we start one? Should it be a sub-committee?

- Hal pointed out that the board needs to contribute to the WIKI.
- Toby asked how the blog would be different than the WIKI. She voiced support of new ideas. Blog would be

more chatty. Toby would like more details such as RSS feeds, how it would stay up to date, what the software is. Hal said he would get back to them and get more details.

Best Practices (GG)—Lost formatting—Terri and Sylvia's updates need to be incorporated and formatting has been lost. Sylvia will resend. Archives have not responded. Gayle asked Hal for a volunteer to format. In the future, the document will be read-only and inactive committees will go to a new section. Gayle will send reminders to outgoing chairs. This is a secretary responsibility now.

Strategic Planning (SJ)—Responsibility passed to Toby. Chris was not available in the last 6 months to help Sylvia move this forward.

11. New Business

Public Relations (GG)—Gayle presents idea of starting active media relations. Leslie suggests media relations person do training on the Web as there are clear rules about how to do this. Gayle points out that this is more than public relations or communication within the Division. This is taking the time and perhaps spending money to build relationships with selected trade publications to advertise B&F outside the association. Gayle, Alexey and Hal had planned to meet and Toby suggested Terri should also be there because there could be financial implications with entertaining or exposing the editors/publishers to SLA. Toby suggests that a report outlining the plan with target publications and potential costs be completed for Denver. The report should detail why this is important for the Division to take on.

CUBL (GM)—Glenn has a plan to create several new committees to increase CUBL membership. Hal questions if this is something that needs to be decided at the board level. Brent pointed out the Division had done this in the past at a division level, not a section level because BRASS extends outside of academic libraries.

Motion: Create a new advisory board position to be the liaison with BRASS. Passed.

- Brent Mai will serve as first chair of B&F/BRASS Liaison.
- Glen asked about creating an award and this would be handled by Awards Chair, not CUBL.
- Cynthia has ideas for her section, Corporate Information Centres Section, as well. She will move forward and keep the board informed.
- The sections can have Web pages that are to be managed by the B&F Webmaster.

B&F Discussion List (HK)—A member has approached Hal disappointed that the list has evolved to document delivery system leading Hal to question what is the point of the list. Toby said it is a vehicle of communication and a value add service to Division members. Gayle said we have discussed improving traffic on the list in the past which led to the PR campaign to increase member subscriptions. And the traffic and purpose did not change much. Terri suggested we simply monitor the situation.

Real Estate Roundtable (HK)—This roundtable chair has asked the board to de-activate the roundtable. There was minimal response to last request for an event and she is stepping down and no one has volunteered to come forward. They did not have enough interest to move from roundtable to section. Toby asked if we are comfortable that we have done everything to keep it to which the answer was yes.

Motion: Deactivate the Real Estate roundtable. Passed.

Stationery (TP)—Toby not sure what the answer was to her request for stationery. Terri and Brent have some remaining letterhead. Tabled until Denver when we decide if we want to create a new logo. Meanwhile electronic invoices, etc. will continue to be created.

Announcement—In Division Cabinet Toby mentioned that Janice LaChance asked for suggestions of CEOs to have lunch with in Denver. She will go to meet them as well. Send recommendations to Janice@sla.org. Toby will put an announcement on discussion list and in *Bulletin*.

Meeting adjourned 12:11 PM.

Respectfully submitted by Gayle Gossen, Secretary, January 2007.

SLA News

Cara Battaglini

29 March 2007 Press Release

Free Access to Leadership and Management eBook Collection Now Available Through SLA's Click University

New Exclusive SLA Member Benefit Brings Nearly One Thousand Titles Directly to the Desktops of Information Professionals

Alexandria, Virginia, USA, 29 March 2007—Click University, the exclusive members-only online learning center of the Special Libraries Association (SLA), today announced the availability electronically of nearly 1000 business titles through ebrary®, a well known eBook technology provider and services company. This decision by SLA to offer members free unrestricted access to books and resources about leadership and management follows numerous upgrades and improvements to the offerings members can access through participation in SLA's Click U.

Click U, which SLA launched in June of 2005, is dedicated to meeting the changing educational needs of information professionals working in corporate and organizational settings. Click U's features and courses are constantly evolving, ensuring they reflect the competency demands of today's information environment. The ebrary collection offers yet another option for busy information professionals looking to expand their skill sets whenever, wherever and however they wish.

As part of its strategy to improve on an already successful member benefit, the Click U team is implementing free access to this collection for SLA members only. The ebrary leadership and management suite provides members with an arsenal of information and resources that will allow them to expand their professional development in accordance with *SLA's Competencies for Information Professionals of the 21st Century.* View here: www.sla.org/competencies.

The SLA competencies document was developed in 2003 by the Association as a forward looking and strategic roadmap for special librarians and information professionals looking to remain relevant and integral leaders in information management within their organizations. It is being used as a guiding light for the Association as it develops programs and benefits in service to members.

"I have long said that information professionals should be thinking about their future and taking action to define it. We have developed the courses being offered through Click U and at SLA's Annual Conference to make it as easy as possible for them to get the training and knowledge they need to be successful," said SLA Chief Executive Officer Janice Lachance. "Part of our mission as the professional association for info pros is to provide our members with benefits that will allow them to shape their professional future. Free access to the top leadership and management content gives our members yet another set of tools to supplement their continuing education activities with resources that compliment the SLA Competencies," Lachance said.

The e-brary Leadership and Management Collection covers a wide range of topics to enhance the ability of professionals to make important business decisions. Key subject areas covered by the content include; leadership, entrepreneurship, strategic planning, management, organizational behavior, personnel management, project management and risk management.

As a special offer to SLA members, ebrary is offering an organizational discount which will allow organizations that employ SLA members to purchase any subject database within the library for an introductory flat rate of $1,000 USD. Members can save more by subscribing to any three ebrary collections for $2,500. More information about the discount is available by contacting Local Knowledge Online at sales@localko.com or 925/837-7464.

1 March 2007 Press Release

Special Libraries Association in Conjunction with the Library Copyright Alliance Strongly Supports H.R. 1201, The FAIR USE Act.

Alexandria, Virginia, USA, 1 March 2007—Special Libraries Association (SLA) today announced its strong support of the Library Copyright Alliance (LCA) and the Freedom and Innovation Revitalizing U.S. Entrepreneurship (FAIR USE) Act of 2007, H.R. 1201. The FAIR USE Act is co-sponsored by Congressmen Rick Boucher (D-VA), Congresswomen Zoe Lofgren (D-CA) and Congressman John Doolittle (R-CA).

At the end of 2006, Dr. Billington, the Librarian of Congress, approved six exemptions from the prohibition on circumvention of technological measures contained in section 1201 of the Digital Millennium Copyright Act (DMCA). These exemptions will sunset in three years. The FAIR USE Act makes these six exemptions permanent.

"Two of these exemptions are very important to the academic, research and special librarians," said SLA CEO Janice R. Lachance. "In the past, the SLA community of librarians and information professionals stood in support of these exemptions for screen readers and film clip compilations. The Fair USE Act will ensure these activities, which are an integral part of many SLA members' day-to-day work with their customers and clients, can continue in the future. Further, the Act will go a long way to eliminate the negative effect the DMCA has had on lawful uses, I applaud these Representatives for introducing this important legislation and encourage Congress to pass H.R. 1201," said Lachance.

The FAIR USE Act would also extend the determinations of the Librarian of Congress in six narrow circumstances. For example, the Fair Use Act would extend the film clip exemption to all classrooms instead of just college media studies classes. It would allow access to public domain works, as well as works of substantial public interest as well as permit libraries to circumvent technological protections for the purpose of preservation of works within a collection. Currently, the DMCA interferes with a library's ability to preserve those works The FAIR USE Act will eliminate this obstacle with no harm to copyright owners.

For More Information:

Read LCA Press Release.

Read Congress of the United States House of Representatives Press Release

Contact SLA Director of PR: Cara Battaglini (703/647-4917) cara@sla.org

Contact: SLA Chief Policy Officer: Doug Newcomb (703/647-4923) dnewcomb@sla.org

1 March 2007 Press Release

For Immediate Release

MEDIA ALERT

2008 Special Libraries Association Annual Conference and INFO EXPO

15–18 June 2008

Calendar Editors Please Note Date Change

Special Libraries Association (SLA) announced today that the 2008 SLA Annual Conference and INFO EXPO will be held 15–18 June in 2008 in Seattle, Washington.

This is a change to the original scheduled date of 27-30 July 2008. Moving the date back a month will allow SLA to remain on its regular schedule of holding the SLA Annual Conference and INFO EXPO in the month of June each year.

This change in date will also allow SLA members, exhibitors, press and speakers to easily attend SLA's conference in addition to other library conferences being held during the same time frame.

The 2007 SLA Conference will take place in Denver, Colorado, 3–6 June, 2007 and will feature former U.S. Vice President Al Gore and Scott Adams, the creator of Dilbert, as the keynote speakers.

Upcoming SLA Annual Conference and INFO EXPO locations and dates are as follows:

2008: Seattle, 15–18 June

2009: Washington, DC, 14–17 June

2010: New Orleans, 13–16 June

2011: Philadelphia, 12–15 June

Questions about SLA conferences? Visit the SLA events page here: http://www.sla.org/content/Events/conference/ac2007/index.cfm.

8 February 2007 Press Release

2008 SLA Board of Directors Candidates Announced

Alexandria, Virginia, USA—The 2008 SLA Nominating Committee today presented 10 highly qualified candidates to the sitting Board for election to the 2008 SLA Board of Directors. Recommendations of potential candidates were collected from among the current SLA membership and presented to the Nominating Committee in January 2007.

In keeping with the desires of the association exceptional talent was sought, as well as professionally diverse and regional representation. Candidates will speak at the annual conference in Denver, Colorado, 3–6 June, 2007. Elections will be held electronically in mid-September 2007.

The approved candidates for the 2008 SLA Board of Directors are:

For President-elect:

Lynn Berard
Gloria Zamora

For Division Cabinet Chair-elect:

Tom Rink
David Shumaker

For Chapter Cabinet Chair-elect:

Susan Fifer-Canby
Lisl Zach

For Director (two to be elected):

Deborah Hunt
R. James King
Martha McPhail
Ty Webb

For more information about SLA's governance practices and leadership, please visit the Board of Directors section of our Web site at http://www.sla.org/content/SLA/governance/bodsection/index.cfm.

Cara Battaglini
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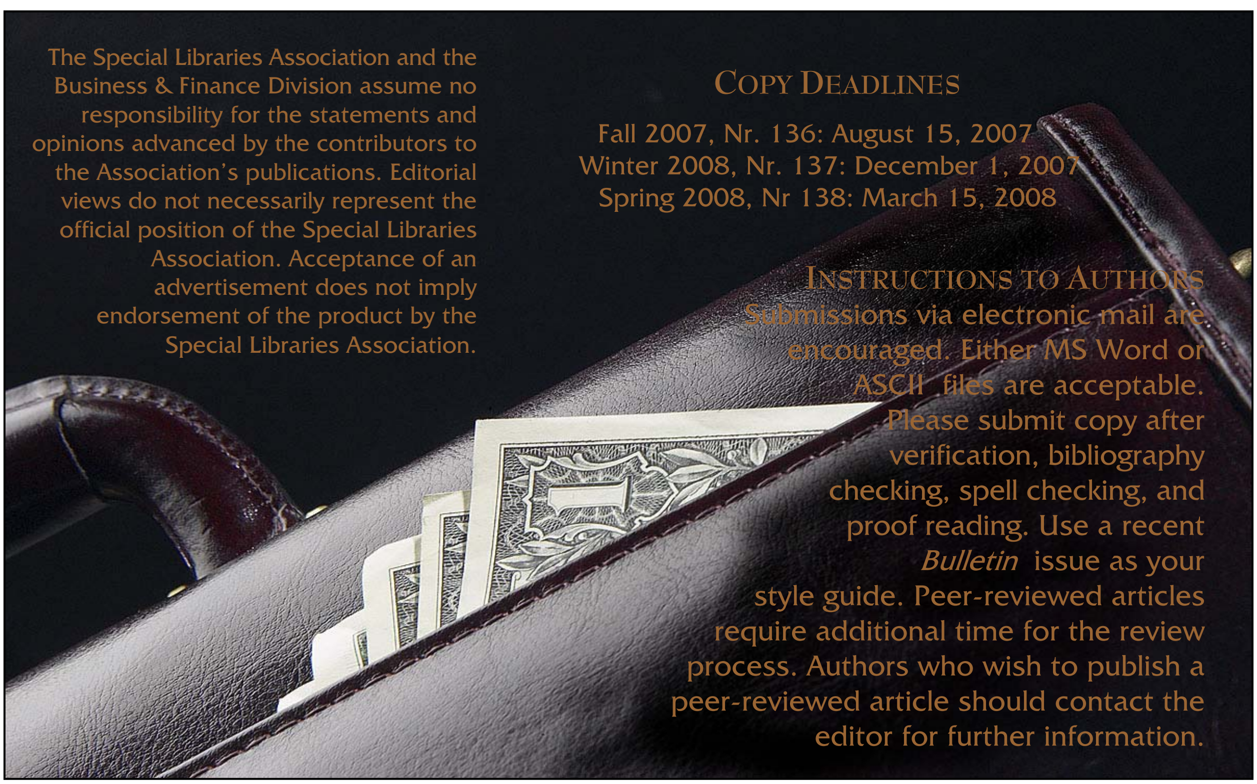
cara@sla.org

SLA Events Calendar

May 4, 2007	June 1, 2007 Board Meeting	**Documents Deadline** (*Posted by SLA Leadership*)
May 7–27, 2007	Online Anywhere	**CIC13 Establishing & Managing the Intelligence Function** (*Posted by PDC*)
May 9, 2007	Anywhere in U.S. and Canada	**Twelve Tips for the One-Person Library** (*Posted by PDC*)
May 23, 2007	Anywhere in U.S. and Canada	**What's on the Horizon: A Look at Where Our Profession Is Heading** (*Posted by PDC*)
June 1, 2007	Denver, Colorado	**Board Meeting** *Posted by SLA Leadership*)
June 2, 2007	Denver, Colorado	**CIC09: Competitive Intelligence Analysis: Intermediate Frameworks** (*Posted by PDC*)
June 2–3, 2007	Denver, Colorado	**SLA Annual Conference—CE Courses** (*Posted by PDC*)
June 3, 2007	Denver, Colorado	**CIC10: Management Analysis for Competitive Intelligence** (*Posted by PDC*)
June 3, 2007	Denver, Colorado	**SLA Leadership Development Institute** (*Posted by SLA Leadership*)
June 5, 2007	Denver, Colorado	**Chapter and Division Cabinet Meetings** (*Posted by SLA Leadership*)
June 6, 2007	Denver, Colorado	**CIC07: Human Source Collection: Research Beyond Published Sources** (*Posted by PDC*)
August 6–24, 2007	Online Anywhere	**CIC04 CI Published Source Collection: Research Techniques, Part I** (*Posted by PDC*)
August 14, 2007	Anywhere in U.S. and Canada	**Moving to Knowledge Services: Managing the Change and Identifying Advocates and Champions** (*Posted by PDC*)

August 22, 2007	Anywhere in U.S. and Canada	**Financial Management of Information Projects** (*Posted by PDC*)
September 6, 2007	Anywhere in U.S. and Canada	**Gary Price's Research Toolbox** (*Posted by PDC*)
September 10–28, 2007	Online Anywhere	**CIC05 CI Published Source Collection: Research Techniques, Part II** (*Posted by PDC*)
September 12, 2007	Anywhere in U.S. and Canada	**Surveying as a Planning Tool, Part 1** (*Posted by PDC*)
September 26, 2007	Anywhere in U.S. and Canada	**Surveying as a Planning Tool, Part 2** (*Posted by PDC*)



Business & Finance Division		**FY2007 Approved Budget**		**30-Mar-07**
Income	**2007 Allotment**		$25,700.00	
	Bulletin			
	Subscriptions	$200.00		
	Advertising	$4,300.00		
	Total Bulletin		$4,500.00	
	Conference			
	Vendor Support	$65,000.00		
	CE Courses	$30,000.00		
	Ticketed Events	$8,000.00		
	Co-sponsor share			
	Total Conference		$103,000.00	
	Interest Income		$2,500.00	
	Total Income		**$135,700.00**	
Expenses	**Communication**			
	Winter *Bulletin* 2006	$2,000.00		
	Spring *Bulletin* 2006	$2,000.00		
	Fall *Bulletin* 2006	$2,000.00		
	Division Web Site	$1,500.00		
	Brochures & Stationery	$500.00		
	Total		$8,000.00	
	Member Development			
	New Members	$500.00		
	Member Awards	$1,000.00		
	Member Recognition	$600.00		
	Mentoring Initiative	$500.00		
	Total		$2,600.00	
	Grants & Student Stipends			
	Grants & Stipends	$10,200.00		
	Mailings; Miscellaneous	$50.00		
	Total		$10,250.00	
	Conference			
	CE Courses	$17,500.00		
	Speakers	$3,000.00		
	Section Meetings	$8,500.00		
	Networking & Recruitment	$42,000.00		
	AV Equipment/Signs	$13,000.00		
	Co-sponsor share			
	Catering Services	$1,000.00		
	Travel	$10,000.00		
	Division Suite	$2,000.00		
	Miscellaneous	$500.00		
	Total		$97,500.00	
	Winter Meeting			
	Catering Services	$850.00		
	Planning Dinner	$500.00		
	Travel	$5,000.00		
	Total		$6,350.00	
	Strategic Planning Group		$200.00	
	Special Research Projects		$200.00	
	Miscellaneous		$100.00	
	Total Expenses		**$125,200.00**	
Total Budget **Surplus** or Deficit			**$10,500.00**	

SLA BUSINESS AND FINANCE DIVISION
ANNUAL FINANCIAL STATEMENT
2006

TOTAL FUNDS AVAILABLE - ALL ACCOUNTS (JANUARY 1, 2006)				**$66,903.28**
CHECKING ACCOUNT, WACHOVIA				
Opening Balance (January 1, 2006)			$18,615.63	
Income	$130,250.00			
Total Income		$130,250.00		
Expenses	$123,496.51			
Transfer to Wachovia Money Market	$20,000.00			
Total Expenses + Transfers		$143,496.51		
Balance of Annual Transactions			($13,246.51)	
Closing Balance (December 31, 2006)				$5,369.12
WACHOVIA MONEY MARKET				
Opening Balance (January 1, 2006)			$0.00	
Income	$253.14			
Transfer from Checking, Wachovia	$20,000.00			
Total Income + Transfers		$20,253.14		
Expenses	$0.00			
Total Expenses		$0.00		
Balance of Annual Transactions			$20,253.14	
Closing Balance (December 31, 2006)				$20,253.14
SLA POOLED FUND				
Opening Balance (January 1, 2006)			$48,287.65	
Income				
Interest Income	$2,422.40			
Total Income		$2,422.40		
Expenses				
Total Expenses		$0.00		
Balance of Annual Transactions			$2,422.40	
Closing Balance (December 31, 2006)				$50,710.05
TOTAL FUNDS AVAILABLE - ALL ACCO UNTS (DECEM BER 31, 2006)				**$76,332.31**

Business & Finance Division
2006–2007 Executive and Advisory Board

Executive Board	
Chair, Hal Kirkwood Mgmt & Econ Library Purdue University 765-494-2921 kirkwood@purdue.edu	**Chair Elect,** Cris Kinghorn Business Information Services Deutsche Bank AG London London, United Kingdom 44 207 547 2747 cris.kinghorn@db.com
Past Chair, Toby Pearlstein Director, Global Information Services Bain & Company 617-572-2943 toby.pearlstein@bain.com	**Secretary,** Gayle (Kiss) Gossen 416-214-4797 gayle.gossen@gmail.com
Treasurer, Terri Brooks Director, Library Services Investment Company Institute 202-326-5904 brooks@ici.org	**Director/Professional Development Chair** Miguel A. Figueroa miguel.a.figueroa@gmail.com
Director/Public Relations Chair Alexey Panchenko Vashe Research alexey.panchenko@gmail.com	**Membership Chair,** Amy L. Affelt Lexecon 312-322-0622 aaffelt@lexecon.com
Advisory Board	
Awards Committee • Toby Pearlstein • Leslie Reynolds, Centers of Excellence Awards Chair West Campus Library 979-458-0138 lereynol@lib-gw.tamu.edu • Awilda Reyes, Chair, Grants and Stipends Government Documents and Maps Librarian West Chester University, PA 610-436-3206 areyes@wcupa.edu • Robert Clarke, International Relations Chair Trent University 1600 West Bank Drive Peterborough, Ontario K9J 7B8 Voice: (705) 748-1011 ext. 1324 robertclarke@trentu.ca • Sylvia James, European Student Award Sylvia James Consultancy 44 1444 452871 da_james@11daymer.freeserve.co.uk	***Bulletin* Editor** Victoria Platt Willamette Management Associates 773-399-4314 vaplatt@willamette.com ***Bulletin* Assistant Manager** Rachel Watstein 646-265-9350 rwatstein@aol.com ***Bulletin* Advertising Manager** Mari Beth Slade mbslade@dal.ca
Division Archivist, Roberta Brody Grad School Library Info Studies City University of New York Queens College 718-997-3790 roberta_brody@qc.edu	**List Owner,** Chris Poehlmann Mendoza College of Business University of Notre Dame 574-631-9099 cpoehlma@nd.edu@nd.edu

Business & Finance Division
2006–2007 Executive and Advisory Board

<table>
<tr><th colspan="2">Advisory Board</th></tr>
<tr><td>Mentoring
Stephen Marvin
West Chester University
610-436-1068
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