

Information Centers That Innovate:

Six Librarians Provide Secrets to Success

A White Paper Prepared by

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NOTE: In this paper, the terms “client” and “customer” are used to identify a librarian’s internal target audience member—i.e., the organization’s employees whom the information center serves; these terms do not refer to a company’s external customer.

Preface

The purpose of this white paper is to identify some specific “best practices” of today’s top information centers. The central question we explore is: ***What are the elements of successful information centers, ones that not only survive but thrive during an adverse economy?***

We posed this question to six information center managers who represent a cross section of industry sectors (financial services, media and publishing, housing and construction, health insurance, and technology) as well as organization types (from a national nonprofit membership organization to a subsidiary of a global corporation).

Following interviews with these information center managers and onsite observation sessions, some common threads emerged in terms of information center strategy, tactics, and programs. While not all tactics are transferable from one environment to another, the strategies and program elements we outline in this white paper may spark some innovative ideas among fellow information professionals.

For each tactic, we cite two or more examples based on the information center interviews. Due to space constraints, we do not mention all interviewees that employ a particular tactic or strategy in each corresponding section. Instead, the cited examples are either unusually innovative instances and/or easily replicable ideas that other librarians might use in their own information center.

Interviewees (listed in alphabetical order by organization) were:

The Baltimore Sun—an award-winning major metropolitan daily newspaper with 1,600 full- and part-time employees, of whom 200 are newsroom staff (Baltimore, MD); we interviewed Sandy Levy, director of Library and Information Services.

BlueCross BlueShield of Florida—an independent licensee of the well-known national

health association serving residents and businesses in Florida (Jacksonville, FL); we interviewed Margie Pace, manager of the Business Research Information Center.

Franklin[®] Templeton[®] Investments—the operating name for Franklin Resources, Inc., a global investment management company with roughly \$246 billion in assets (as of March 31, 2002) under its management and more than 6,400 employees around the globe (San Mateo, CA); we interviewed Larisa Brigeovich, manager of the library.

Freddie Mac—a stockholder-owned corporation chartered by Congress in 1970 to create a continuous flow of funds to mortgage lenders in support of homeownership and rental housing (McLean, VA); we interviewed Lois Ireland, manager of the Corporate Information Resource Center.

MITRE Corporation—a not-for-profit national resource that provides systems engineering, research and development, and information technology support to government agencies such as the Department of Defense, the Federal Aviation Administration, and the Internal Revenue Service (principal locations in Bedford, MA, and McLean, VA); we interviewed Dave Shumaker, manager of InfoCenter Services.

National Association of Home Builders—a federation of state and local construction-related industries, including more than 850 state and local builders associations throughout the United States, representing 205,000 members (Washington, D.C.); we interviewed Nancy Hunn, director of Information Resources and Services for the National Housing Resource Center.

Introduction

Three major forces today affect the information center's role in organizations across industry lines:

- the current economic downturn
- the overall economic trend toward globalization
- the dizzying technological advances in knowledge management.

In such an ever-shifting environment, the successful librarian remains vigilant and proactive in driving an information center's evolution.

Even as organizations slash or eliminate library budgets, many strive to continue promoting and maintaining corporate visibility, culture, and efficiency across borders and even across oceans. Staying abreast of new technologies that might support communication and information exchange is an ongoing, critical task; the adoption of a new product or service typically requires a prior thorough cost-benefit justification.

The list of challenges facing many of today's librarians, according to interviews conducted for this white paper, includes some or all of the following:

- Maintaining or even expanding products and services with fewer resources.
- Ensuring continued perceived value of the information center despite increased end-user access to research and knowledge management tools.
- Staying up-to-date and informed about the latest knowledge management tools and technological advances that might benefit the organization.
- Developing and maintaining a corporate intranet site in addition to traditional duties and responsibilities.
- Transforming corporate archives from hard copy to electronic—from physical to virtual.
- Expanding service delivery from a single, onsite location to multiple offices nationally or internationally.

Many librarians report that the onus typically falls on information professionals not only to catalyze a library's development and change, but also to demonstrate continually its ongoing return on investment or ROI. However, successful librarians view this task not as a burden, but as an opportunity to position the library favorably to their organization's leaders.

The key in such challenging times is to anticipate—to offer services that fill needs an organization's leaders may not even have identified yet. A model for such positioning might highlight a library's indispensable and valuable role as an organization copes with the aforementioned three forces: the economy, globalization, and technology:

- ***Drives sound, informed business decision-making:***
A fully staffed and equipped information center can enhance an organization's strategic planning and decision-making, ultimately benefiting the bottom line.
- ***Allows for virtual information exchange:***
A skilled information professional's involvement in worldwide knowledge management can be critical to positioning the organization externally, to identifying and researching new business development leads, and to facilitating effective employee information sharing among multiple offices.
- ***Enhances productivity:***
An organization that embraces technology's power in facilitating information gathering and dissemination not only enjoys a cost saving through increased efficiency; it also frees trained research staff to focus on more complex, high-level projects that help advance an organization's mission and goals.

While no generic roadmap exists for information center success, the librarian with a clear destination in mind certainly can benefit from hearing about colleagues' experiences in their journeys.

Clearly Defined Mission or Strategy Helps Maintain Focus on 'ROI,' End Results

Information center managers with a well-defined mandate and accompanying goal are most likely to produce results—a return on investment (ROI). Defining success or determining the endpoint makes the process of getting there achievable.

The degree of management involvement in this process varies. Some librarians receive a specific mandate upon joining an organization. Others face the challenge of developing their own vision and goals and then “selling” the program to senior management.

While exact semantics are less important than content, planning terms of the librarians’ interviewed include some or all of the following concepts:

- **Mandate or mission:**
What is the library’s overarching purpose? Why was it formed? What is the latest big-picture challenge facing its manager?
- **Goal:**
In the context of the mission or mandate, what are the librarian and staff trying to achieve? Some find it helpful to define success and write the goal based on that scenario.
- **Objectives:**
What are some short-term, highly specific, measurable objectives? These milestones help chart progress toward achieving the overall goal.
- **Strategy:**
How will you accomplish the above goal(s) and objectives? What is the general approach?
- **Audience(s):**
Rather than try to be all things to all people, the successful librarian is clear about defining and then understanding the key target audience or audiences. You may want to prioritize this list.

- **Tactics/Tools:**
Finally, what are the specific program elements? What activities will the information center conduct? What products and services will you make available? [Note that the bulk of this paper focuses on “best practices” for tactics and tools.]

For example, Larisa Brigeovich, upon joining Franklin Templeton’s Fort Lauderdale office in 1996 as library manager, was given a very clear mandate; she based her planning process on that foundation:

- **Mandate:**
To transform the primarily paper-based library that serviced local employees into a world-class, high-tech global research center closely integrated with the company’s investment research process.
- **Goal:**
To provide high-quality, timely, and cost-efficient information services and products.
- **Strategy:**
To understand the information needs and challenges facing research analysts as the foundation for customer-focused information services and products.
- **Audience:**
Franklin Templeton’s research analysts, its key revenue-generating group.
- **Tactics/Tools:**
Some of the Franklin Templeton library’s specific tools and tactics are highlighted in upcoming sections.

In a second example, the organization’s overall historic focus formed the foundation of the modern-day library’s goals. At *The Baltimore Sun*—which was founded 165 years ago “to be a people’s paper devoted to the news that most directly affects the lives of its readers”—Sandy Levy, director of the paper’s Library and Information Services Department, developed complementary, clearly articulated goals:

- To provide accurate and current information from internal and external sources with sensitivity to deadlines and economics.
- To acquire and maintain state-of-the-art knowledge about information resources and technology in order to secure the best possible information for the library's clients.
- To be actively involved in the pursuit of information in concert with the newspaper's reporters, editors, photographers, artists, and management.

Ms. Levy's strategy, albeit informally stated here, meshes with that of Ms. Brigeovich and most other librarians interviewed: "It's all about bonding with the users and building a relationship that lasts longer than one request."

In Washington, D.C., at the National Association of Home Builders headquarters, Nancy Hunn, director of Information Resources and Services for the National Housing Resource Center, said the center's goal is to create a one-stop shop of continually updated housing-related information for association staff and members—a virtual shop that is "open" 24 hours a day, seven days a week. This goal can be broken down into three parts:

1. Capture the association's intellectual capital, both present and past
2. Integrate references and links to relevant *external* housing-related news and information
3. Make those assets and resources accessible at the end-user's desktop in a timely manner.

Ms. Hunn's strategy—or her formula for success—is three pronged:

1. Leverage the information and knowledge management skill sets of her professional team for the success of the association
2. Maintain a customer-centered focus
3. Align the resource center with the association's mission, goals, and strategic plan. In this case, the association's senior management and its senior officers have been particularly supportive

of the center's mission, goals, vision, and strategic plan.

A key objective—which grows out of the customer-centered element of the strategy—is to transition the resource center from physical to virtual information environment, *i.e.*, from paper to electronic. In addition, Ms. Hunn and her staff strive to provide information and knowledge management consulting services to their colleagues whenever needed.

Customer Needs Assessment, Input and Feedback Allows for Targeted Programs and Products

Many successful librarians—including some interviewed for this study—base a strategy and corresponding tactics on an upfront needs assessment or audit. Once a library program is established, continual check-ins with users can help ensure the library's continued relevance and responsiveness to demands.

As a first step in her global library planning process at Franklin Templeton, Ms. Brigeovich did an environmental scan or situation analysis about this global investment management firm and an audit of the existing library's assets, services, and products. Some highlights of the results follow:

- No professionals on the library staff.
- A paper-based library with fewer than 100 books and scant online resources.
- Limited products available to end users on their desktop.
- Library users almost exclusively locally based (the Fort Lauderdale office); few remote employees accessed library services.
- Busy target audience—research analysts and portfolio managers in offices worldwide who are constantly on the move visiting companies around the globe and managing multiple client portfolios. Frequent travel and increasingly demanding work environment leave little or no

time for mastering Franklin Templeton's available research systems.

- Redundancy and overlap in key information services contracts across offices, resulting in excessive costs for vendor services and internal contract administration.
- Senior management and clients alike perceived the library as an administrative, back-office function primarily supporting paper filing and periodicals subscriptions rather than a critical business-support unit capable of adding value to the investment research process.

With acquired business insight and gap analysis, Ms. Brigevich set out to develop professional library and information services that would align with Franklin Templeton's strategic goals and ensure the library's future in the organization. Ms. Brigevich structured the first innovative program that provided a solid foundation for future initiatives: Having analyzed multiple similar vendor contracts throughout Franklin Templeton, she successfully consolidated most accounts, resulting in an average of \$3 million in annual savings. Demonstrating the return on investment to senior managers was far easier with such concrete examples, as opposed to developing a program in a vacuum and presenting it as a *fait accompli*.

Once a library program is launched, a wise information center manager continues soliciting user feedback on a regular basis. In his never-ending quest for innovative ideas that will keep his library relevant and useful, Dave Shumaker, InfoCenter Services manager for MITRE Corporation, conducts customer surveys and gathers other relevant statistics at MITRE's two primary locations outside Boston and Washington. Results yield data on user satisfaction with existing products and services, suggestions for enhancements or changes, and updated, fresh perspectives that InfoCenter staff can use in their brainstorming.

"Being a librarian is like riding a bicycle," Mr. Shumaker said. "If you stop pedaling and moving forward, you fall off." Direct involvement of his customers is key to refining research products and services and developing new ones.

Decentralization of 'Traditional' Functions Frees Time for More Innovative, Complex Tasks

As a strategy to stay forward focused with a 20,000-foot perspective, several librarians farm out or delegate to other areas of the company information center functions that some consider "traditional."

For example, the purchase of employee subscriptions and publications can be administered by business units or staff members, relieving the information center of having to play an intermediary role. At MITRE Corporation, the InfoCenter empowered users to order their own subscriptions, publications, and other information materials. At Franklin Templeton, Ms. Brigevich handed off group subscriptions responsibility to purchasing, using the transition as an opportunity to forge a positive working relationship with that department.

Vendor liaison is another area that can be administered elsewhere. By transitioning global contracts management and administration to the Market Data Services Group, which is responsible for vendor contract management issues such as infrastructure and delivery, Ms. Brigevich had more time to focus on enhancing Franklin Templeton's business processes through delivering custom-tailored information products.

Training and Empowering End User in Basic Research Enhances Library Cost-Effectiveness

Librarians interviewed tended to share the philosophy of offering non-library staff desktop access to key user-friendly research tools and then providing appropriate training as necessary to foster self-sufficiency for basic searching. Far from making a library's role obsolete, such empowerment tends to enhance its positioning as a critical element of an organization and also frees library staff time for more complex, time-consuming, and strategic knowledge management projects.

Over the past five years since *The Baltimore Sun* newsroom staff was given desktop access to the LexisNexis services, the increasing amount of research that reporters do on their own is staggering. Ms. Levy and her staff offer regular training and orientation for the newspaper's staff—524 news and non-newsroom staff members attended research workshops in 2001.

Last year alone, newsroom staff conducted a total of 119,145 searches using LexisNexis™ at www.nexis.com—an average of 326 each day. As reporter confidence and familiarity with LexisNexis at www.nexis.com has grown, the number of research requests to the library has grown as well—a phenomenon Ms. Levy said demonstrates deepening appreciation among reporters of how skilled researchers can enhance their effectiveness in more complex information gathering projects.

At BlueCross BlueShield of Florida (BCBSF), Margie Pace and her team provide trainings including the following:

- The creatively titled, popular series of *Lunch & Learn* sessions on research topics such as effective use of the intranet and Internet.
- BCBSF executive secretary workshop on navigating the Business Research Information Center portal.
- Monthly LexisNexis classes for individuals and small groups on maximizing the value added by LexisNexis at www.nexis.com.

The information center at a trade organization could take advantage of an annual conference to reach geographically dispersed members. For example, the National Housing Resource Center at the National Association of Home Builders uses the annual International Builders' Show as a venue for reaching its builder-members. At last year's show, which drew 71,000 builders from around the country, the resource center staff sponsored and taught 21 well-attended computer labs for the members. Topics included (1) an introduction to the Internet, (2) effective Web navigation, and (3) an overview of important housing industry-related Web

sites (e.g., economics, statistics, construction, and business management issues).

Back in Washington, the National Housing Resource Center also conducts internal information-related training for association staff on topics such as using the Internet, copyright issues, Sirsi library database fundamentals, and introduction to the intranet.

Organizing and Digitizing Archives Improves Access to Key Documents

Tracing a corporation's history and cataloging key related internal documents can be a "feel-good" exercise—a fascinating journey back in time, a way to engender company pride, and a potential employee morale booster. In addition, keeping archives well organized and updated can enhance a business's current efficiency and productivity, as important documents are accessible when needed. And finally, a corporate archive project can be an opportunity to raise a library's level of visibility, as knowledge management expertise typically is welcomed and invaluable for this task.

When Ms. Pace learned that the current BCBSF chief executive officer wanted to capture the company's history, she volunteered to participate in a cross-departmental workgroup to help realize his vision. Her perspective as a knowledge management professional added a crucial element to this workgroup, particularly in helping determine roles and responsibilities.

The following were among the ideas Ms. Pace outlined in her proposal, which was adopted and approved by the workgroup:

- Set up a formal "corporate archives" within the Business Research Information Center.
- Have BCBSF corporate communications staff capture oral histories of retirees and others with a long history in or with BCBSF.

- Retain a professional archivist, an experienced, qualified expert, to manage this ambitious project (including the systematic collection and digitization of photos, documents, and other memorabilia).
- Produce a BCBSF “history calendar” as a holiday gift for retirees. (Due to its popularity among current staff as well, the calendar was distributed to all 9,000 employees.)

For a newspaper person, historical records—whether last week, last year, or last century—aid in the thorough reporting of a current event. At *The Baltimore Sun*’s library, Ms. Levy has tackled and successfully completed the following to upgrade and expand the *Sun*’s archives:

- Conducted a major overhaul of hard-copy clipping files dating back to the early 20th century; a task that included sorting through 2,786 boxes of newspaper articles and handling more than one million folders.
- Implemented a system to handle the preservation of rare books, *Baltimore Sun* ledgers, H.L. Mencken articles, and ticker tape from the historic Scopes Monkey Trial; the newspaper’s collection of such monographs exceeds 5,000.
- Incorporated more than 12,000 electronic photos, graphics, maps, and charts to the image archive.
- Indexed the never-ending stream of new stories and placed them in the electronic archive each time the daily paper is published. Each day, five library staff members reconcile the paper’s final edition with the electronic version, check all fields and tags against *The Baltimore Sun*’s proprietary taxonomy, and revise or enhance them as appropriate. The archived electronic text is made available on newsroom staff desktops, as well as through commercial information vendors such as LexisNexis.

The electronic archive is a reporter’s lifeline, Ms. Levy said. The importance of keeping it current cannot be overstated. Last year, *The Baltimore Sun*

staff searched the text archives over 240,000 times—or 660 times each day.

Members and staff at the National Association of Home Builders also depend on easy access to recent and past internal documents and association publications. The National Housing Resource Center team has organized the systematic capturing and digitizing of these association documents. Ms. Hunn’s staff solicits and collects key publications and reports from the association’s core competency areas, which then are supplied to a vendor for cataloging and scanning into *HouseCat*, the resource center’s online database from the Sirsi Corporation. *HouseCat* is a powerful tool that allows the end user to browse a user-friendly, subject-arranged taxonomy to locate documents. Staff members now have desktop access to a Web-enabled, user-friendly database of the association’s knowledge assets—past and present.

Immersion in Day-to-Day Business Operations Provides Insight, Improves Service

A library’s degree of success depends on its staff members’ true understanding and appreciation of the overall organization’s day-to-day business operations and challenges and long-term vision. As such, librarians willing to immerse themselves into the activities and planning processes occurring *outside* the information center can gain invaluable insight into an organization’s workings. Through listening, observing, and absorbing, such researchers are able to develop more directly applicable, tailored products and services that help drive an organization’s productivity and ultimate success.

About four years ago, Ms. Levy established a liaison system between researchers and newsroom staff at *The Baltimore Sun*. Each research staff member is liaison to one or more desks or newsbeats, such as metro (*i.e.*, local Baltimore general news), business, features, foreign, or the

editorial board. Liaisons attend desk meetings where short- and long-term editorial plans are discussed, so that they can anticipate what research reporters may require or even proactively offer support as opportunities arise. In addition to spot research for that day's news, liaisons also are available to help on in-depth investigative or "enterprise" stories from start to finish, such as a lead paint series; coverage of the funeral of Johnny Unitas, the well-known former Baltimore Colts quarterback; Maryland ecologists' Summer 2002 battle to eradicate the non-native, predatory snakehead fish; and *Where Maryland Stands*, a recurring feature of small charts on the op-ed page that compare Maryland to other states.

These "beat" researchers not only begin to specialize in a particular topic, they also become familiar with the editorial process in their news section or group, the criteria for determining what is considered "newsworthy," and the strategic direction of that particular news desk. As such, these library staff members can be more proactive, even taking initiative to scan literature for story ideas to suggest.

At MITRE Corporation, while the industry is entirely different (systems engineering and information technology versus daily news) Mr. Shumaker shares Ms. Levy's conviction that a library's staff must stay closely connected with an organization's hands-on operations. As at *The Baltimore Sun*, each MITRE librarian is assigned to one or more strategic business unit. The liaison is deeply involved in key projects, allowing for a more comprehensive involvement of research staff in MITRE's daily operations.

This liaison platform helps establish relationships outside of the information center; demonstrate librarians' genuine commitment to understanding and serving its staff in a substantive, customer-focused manner; and, most important, contribute significantly toward the organization's overall success.

Customized Products and Tools Provide Value-Added Service to Customers

Whether developing a single, online tool or product, a research portal or an overall intranet site, the more successful librarians customize products based on their target audience. Considerations include not only how technically savvy the users are, but also what *their* task or ultimate goal is.

Tailored Search Tools and Services

At Franklin Templeton, Ms. Brigevich custom-designed a research service with her customer's end product in mind: the semi-annual investment reports that research analysts are required to produce for this global investment management firm. With a thorough understanding of this end product, Ms. Brigevich now offers analysts a service called the "country and industry information package" (CIIP) that yields precisely the data analysts need to draft these reports: e.g., independent country or industry analysis, trends and forecasts; statistical data; broker research; news; and other documents selected by the library staff from a wide range of sources. Delivered via email on schedule, the CIIPs save the analysts a great deal of time.

Similarly, to simplify analyst's everyday use of LexisNexis at www.nexis.com—a powerful research tool that is extensive and sophisticated—Ms. Brigevich worked closely with LexisNexis representatives to develop an easy-to-use, in-house version for routine searches—an interface she named *LexisNexis Express Search Service*. Each analyst who subscribes to LexisNexis at www.nexis.com now has desktop access to a streamlined query form that asks for only a handful of key variables (e.g., company, country, and industry).

Then, based on LexisNexis SmartIndexing Technology™ and relevancy ranking, carefully constructed search strings run behind the scenes, scan the Franklin Templeton pre-selected set of

content sources, and yield highly relevant results. With this intuitive, customized user interface, busy analysts can retrieve critical information quickly without having to master any complex command syntax and searching techniques.

Portals with Custom-designed Structure

At least two librarians interviewed mentioned using subject-specific channels as an organizing element for research portals to internal and/or external content. For ease of use by library customers, the topics should correspond as closely as possible to the organization's actual structure and areas of expertise, these librarians agreed.

At MITRE Corporation, Mr. Shumaker's intranet "knowledge zones" provide a customer-oriented method of categorizing internal materials as well as relevant external links. The zones—which each cover one specific MITRE-relevant topic (*e.g.*, aviation and aeronautics, command and control, computing systems, defense, information management, and satellite-based technologies)—are each managed by a library staff member or "steward." The stewards work under the direction of an advisory group composed of subject-matter experts from different MITRE strategic business units to ensure that applicability and relevance of sources and content.

The BlueCross BlueShield of Florida intranet also includes a research portal organized by channels designed to meet the information requirements of each major client group (*e.g.*, clinical medicine, human resources, e-commerce/technology, leadership and management, health care industry, Medicare and senior citizens, and competitor intelligence). Each channel provides access to articles, research, and other information from LexisNexis and Internet resources. In addition, the structure allows for integration of this external information with internal reports—thus fostering information sharing and exchange among staff.

As an example of how customer-focused these channels are by design, the "competitor intelligence" channel is geared toward BCBSF's sales force

needs and functions. Here, a salesperson can obtain business-critical background on competitor health insurance providers, their products, rate changes, and health care industry news. This channel provides access to competitor Web pages and same-day news stories, as well as a company profile on each competitor. Ms. Pace currently is exploring development of an online forum where sales staff and others can post information and exchange ideas.

At Franklin Templeton, where specific company information is an integral part of the business process, Ms. Brigevich is actively involved in designing a customized research portal that automatically retrieves and formats business-critical information. The tool also will integrate internal and external information seamlessly and provide research analysts and portfolio managers with electronic collaboration, workflow, and personalization options.

The streamlined tool is expected to reduce by nearly one-third the time Franklin Templeton analysts spend on such research due to transparent access to multiple databases and pre-defined automated searches. The analyst simply will key in a company name, which then will link to different types of information accessible from a single screen, including company tear sheets, earnings estimates, internal research reports, company news, broker research, and other types of reports, documents and pre-selected Internet resources.

Working on a cross-disciplinary team to realize this portal project, Ms. Brigevich has been building a document repository database as part of the portal's foundation, helping on a number of fronts, including the following:

- Develop business information search terms and criteria
- Integrate external databases
- Refine end-user interface functionality
- Design search and navigation, taxonomy and metadata
- Conduct user acceptance testing

Customer-focused Intranet Tools

As information centers increasingly include intranet development and maintenance among their responsibilities, the librarians interviewed shared some creative ideas for what to include and how. Again, a common philosophy prevailed: *Base intranet content and structure on user needs and focus*. Whether or not customers are directly involved in intranet design and maintenance, information center managers need to keep the user perspective foremost in mind.

Content is a top criterion in selecting an intranet tool, most librarians agree. BCBSF chose LexisNexis' Smart Tools from the three major vendors offering intranet tool kits due to the relevancy of its content sources to the particular needs of the staff. Smart Tools offered world-class sources on relevant topics such as the field of medicine (the GENMED file), and the breadth and depth of its Florida and regional coverage was the most comprehensive, given its vast array of publications and resources.

At *The Baltimore Sun*, Ms. Levy has organized the intranet based on the kinds of information reporters tend to need. The Library and Information Services page—dubbed *The Loop*—is a veritable encyclopedia of custom-selected facts and resources for these Baltimore-focused journalists. These *Sun*-specific intranet resources include the following:

- General Baltimore and Maryland ready-reference materials are organized under *FAST FACTS*. Topics include the gubernatorial and county executive races, famous Baltimore people and things, and a link to SAILOR, the State of Maryland's public information network.
- Maryland's Court Records are available, accompanied by an interpretation of the codes used (a *Baltimore Sun* library staff member developed a glossary of terms and annotations to assist reporters in interpreting these jargon-heavy documents).

- For business reporters, the Baltimore and Maryland Merchant page includes information and resources about area commercial establishments, zoning, and other relevant facts.
- Event-specific intranet pages are developed periodically to provide reporters background and research materials on hot news topics, such as the September 11th attack, anthrax, military deployment, and the energy crisis. Since such stories typically are covered by multiple reporters from a variety of angles, having access to a range of relevant resources helps the writers get up to speed quickly on a complex, ongoing issue and find the specific background and statistics needed given a specific story's focus.
- The intranet also provides access to the *Baltimore Sun*'s electronic text archive back to September 1990 and any pre-1990 *Sun Paper Clips* that have been digitized and are full-text searchable; the library catalog; LexisNexis at www.nexis.com; a host of databases and reports; and an extensive list of Web sites categorized by subject.

To ensure ease of access to a particular topic within this rich repository of information, the *Baltimore Sun* Web team recently created a new "search *The Loop*" function that appears on each page across the top.

The Loop's popularity is evidenced by the number of hits in calendar year 2001. Ms. Levy reports 174,891 hits for the homepage; 268,244 for the library page; and 7,064 for "search *The Loop*." That's an average of more than 700 *Loop* hits and 20 *Loop* searches per day.

At MITRE Corporation, Mr. Shumaker spotted an opportunity to leverage via the intranet the research results from individual queries his researchers receive during the course of a normal InfoCenter workday. If the topic and contents might have broad appeal, he "recycles" the query along with the information his staff retrieved by posting it on the intranet. While many "question-and-answer" newsletter or intranet sections can turn into time-consuming endeavors for the publisher, the MITRE

intranet “question-and-answer” section does not involve increased workload for his staff; instead, he gets additional mileage from the work already performed.

At the National Association of Home Builders, information is critical to the organization’s success, and the intranet provides a user-friendly, intuitive way to access a rich repository of materials and resources. From mold to property rights, from Canadian lumber to air quality, the association’s 350 lawyers, economists, and other staff members must have the very latest news and information on a huge variety of topics to represent and advise its members.

Ms. Hunn and the National Housing Resource Center staff—with significant input from their association colleagues—have developed a number of customer-focused elements on the intranet:

- *Integrated external industry news with internal input*
With LexisNexis Intranet Publisher, the association tracks key issues in the news, such as brownfields, air quality, wetlands, smart growth, fair housing, and mold. In addition, it also follows on a daily basis mentions in the news of the association, its senior officers, and its councils. Content managers are able to highlight certain articles, attach or reference related internal documents, and annotate with subject-specific comments.
- *Quick Reference Toolkit*
A customized, annotated list of resources devoted to general reference topics, including business and government information, dictionaries, encyclopedias, and reference books and directories.
- *Hot Housing Issues*
A compilation of the latest internal housing-related information from the Sirsi database, including library books, articles, videos, and audiocassettes. Annotations list related Web sites as well.

- *Housing FAQs*
A topically organized list of questions and answers on various aspects of residential construction and its related sectors. Contributors include association staff experts in economics, environmental issues, business management, and sales and marketing. The resource center staff is working with the rest of the association’s departments to build this resource.

Periodic Industry News Updates

At least several of the librarians interviewed said they scan and compile industry news briefs on a periodic basis—even daily. Many librarians seek technological options for automating this process—at least for the initial sweep of a broad range of publications and other sources. Another technique several interviewees mentioned (which also can be automated) is to sort the results into subject-specific folders, allowing for users’ at-a-glance scanning of the day’s selection of articles. Finally, some librarians use a service such as LexisNexis Intranet Publisher that also allows for a content manager to highlight or annotate certain stories for colleagues, even linking to related internal documents.

At Freddie Mac, Lois Ireland, manager of the Corporate Information Resource Center, uses the LexisNexis Tracker product for *Daily Industry Alerts* to automatically retrieve stories that meet very specific search criteria on relevant financial topics and saves them in folders organized by topic (e.g., mortgage insurance, mortgage banking regulations, mortgage technology, and congressional news). Articles are posted on both the company intranet homepage and the resource center’s Web page, which all 4,000 Freddie Mac employees can access.

At the MITRE Corporation, the InfoCenter publishes a weekly electronic newsletter, *Technology Times*, with roughly two-dozen informative abstracts of recent key developments in technology, defense, information security, and any other MITRE-relevant topics. Compiled and abstracted by MITRE’s library staff and edited by the librarian editor, this newsletter provides high-level picture of interesting and critical developments that affect MITRE’s

current or potential future work—including a “top story of the week” selected by the librarian editor.

At the National Association of Home Builders, which represents the \$328-billion housing industry, a daily summary of key housing-related news stories is provided to executives and staff through Lexis Nexis Intranet Publisher. The association’s librarians sort through the daily updates and post the key ones under salient housing-related topics. An indexer uses these articles for an online Web publication called *Housing Abstracts*. She surveys the listings, pulls relevant ones that she needs for her abstracted summaries, and catalogs and abstracts them on Sirsi. At the end of each month, data from these Sirsi records are exported to *Housing Abstracts* and made available to all association members, affiliates, and staff through the intranet and the members’ Extranet.

Under Ms. Pace’s leadership at BlueCross BlueShield of Florida, the Business Research and Information Center each morning compiles and posts on the corporate Intranet the *Daily Health News Report*. A library staff member scans trade and mainstream press for particularly relevant stories and posts that day’s edition by mid morning. The organization’s staff relies on the newsletter, which attracts regular visitors to the Web site every day.

Partnerships Forged with Customers Strengthen Relationships, Encourage Two-Way Exchange

While remaining focused on achieving an overarching mission and goal, successful librarians demonstrate flexibility and a willingness to provide counsel and hands-on assistance to other areas of the organization as needed. Whether the demand is for professional knowledge management expertise or simply “roll up your sleeves” involvement on non-library projects, creative information center managers recognize the value of such partnerships with fellow staff in the organization.

Librarians at the National Association of Home Builders and at Freddie Mac report frequently providing expertise and assistance on various projects such as taxonomy or intranet development. Ms. Hunn reports that she and her staff frequently work alongside association colleagues on special knowledge management initiatives. Her staff developed a taxonomy and an index for a 1,000-page public affairs publication. And she never hesitates to volunteer her own and her staff’s time to work side by side with colleagues at events such as the annual International Builders’ Show.

In addition, Ms. Hunn and her staff devoted a year and a half to developing an association-wide taxonomy—systematically gathering input and direction from each department one at a time. The final product—a 63-page taxonomy on housing and housing-related issues—is now being used as a framework for organizing content in *HouseCat*—the association’s knowledge base.

At Freddie Mac, Ms. Ireland and her staff participate on numerous workgroups and projects outside the Corporate Information Resource Center, serving on committees focused on the following:

- Providing taxonomy input on a document management initiative.
- Developing an overarching intranet taxonomy.
- Mentoring other departments on their own Web page design and content management.
- Serving as liaison between Corporate Relations and other business units in her department on employee communications.

Ms. Ireland said such committee work provides an invaluable opportunity for exposure of CIRC—showcasing her team’s expertise and commitment to participating in key firm initiatives.

At MITRE, which has a long-standing tradition of encouraging open communication and exchange among employees, an InfoCenter staff member recognized an opportunity to enhance the effectiveness of an ongoing organization-wide

series of presentation and discussion sessions. The InfoCenter began sending at least one staff member to take notes and summarize each MITRE Technical Exchange Meeting, where a subject matter expert presents on a hot topic such as homeland security, digital convergence, biometrics, or XML. The InfoCenter staff member's summary, as well as electronic versions of any handouts or briefing material, is then posted on the MITRE intranet so employees who could not attend can access the information. Mr. Shumaker, who continuously fosters innovation, participation, and collaboration between and among his InfoCenter staff and other MITRE employees, was delighted when one of his librarians and a customer came up with this idea of leveraging content for wider distribution and use.

At BCBSF, Ms. Pace emphasizes cross-departmental partnering as a key strategy and focus for her Business Research Information Center. For example, when a BCBSF subsidiary requested counsel in designing and launching a knowledge management initiative, Ms. Pace offered the "consulting" services of Dee Baldwin from the Business Research and Information Center. Ms. Pace approved her relocation to the subsidiary for a three-month, on-site "loan" in exchange for funding to hire a temporary librarian to cover for her. Ms. Baldwin's performance left a lasting impression, as did Ms. Pace's willingness to accommodate the request.

In addition, over the years, Ms. Pace and her team members have participated willingly in numerous workgroups to design and develop information management applications and services. Among their colleagues on these task forces are members of the Web solutions team, the information technology department, and the public relations office.

Recently, Ms. Pace convened such a cross-disciplinary workgroup herself when she sought user feedback in creating the BCBSF intranet site and, specifically, in selecting an information services vendor. The group met regularly for weeks, even off site, to define topics and content, oversee

page design, and ultimately realize their collective vision of a research portal for all staff. Each member's input and perspective were valuable to the process, and the involvement of staff from different areas of the organization facilitated buy-in and support of the intranet site.

Creative Marketing and Positioning Raises Library Visibility and Highlights Integral Role

Many tactics described so far result in a side benefit of positioning the library as a valuable part of its organization or company. Some librarians also conduct activities with the sole purpose of positioning or marketing the library.

Leverage Location: Lobby for It, Celebrate It

For single-office organizations or for those with a large staff at its headquarters, the library's physical location, design, and appearance can help enormously in positioning it in the minds of staff as a central, key resource.

Freddie Mac's information center is in a prime location next to the building's central escalators, a major thoroughfare for employees moving through the building. Its interior is spacious, with inviting tables and study carrels equipped with laptop hookup. Its most striking and symbolic feature is its glass wall—everyone walking through the building can see this valuable resource and vice versa. This visibility is an excellent metaphor for Ms. Ireland's commitment to full service and information sharing with Freddie Mac staff.

When the Franklin Templeton library relocated in the summer of 2001, Ms. Brigevich lobbied for and landed a prime central location not far from the analysts' office area. Coincidentally, like the Freddie Mac library, hers has glass interior windows as well, a feature that meshes with Ms. Brigevich inclusive approach to library services.

To publicize and celebrate its new location, the Franklin Templeton library staff hosted an elegant English-style tea party. In the spirit of the analysts' competitive nature, Ms. Brigevich organized a contest: identify current library staff members as pictured in photos taken a decade or more ago. Winners left with impressive prizes donated by generous vendors. All participants got some exposure to the research staff and resources available to them. The resulting goodwill and exposure remains among analysts and other staff members.

Holidays as Hooks: Weave in a Marketing Theme

Due to Ms. Ireland's marketing expertise and prowess, Freddie Mac's Corporate Resource Information Center (CIRC) has three times won first place at the Special Libraries Association Marketing Division's Swap and Shop session. One of her most creative marketing techniques is how she leverages National Library Week by developing a theme and maximizing exposure.

One year, Ms. Ireland and her team based the week's publicity campaign on a "survivor" theme. Posters featured a man crawling on the desert, cell phone in hand, with the following text: *"In today's business environment, you can't survive without the right business information. We have the survival tools you need."* Giveaways at the "survivor" open house included a "survival kit"—a tin box filled with essentials like chocolate and trail mix—along with CIRC's logo and contact information. Seven hundred Freddie Mac employees attended.

For National Library Week this year, Ms. Ireland played off of her library's acronym: *CIRC, the CIRCus of Knowledge*. Colorful flyers invited everyone to an open house "featuring in the big tent resources from the four corners of the earth, with ferocious applications" and with a playful warning not to feed the librarians. With a huge fiberglass tiger standing guard by CIRC's entrance, library staff dressed as ringmasters in colorful suspenders and top hats. Nearly 900 Freddie Mac staff members, including senior vice presidents, happily

accepted "giveaways"—pinwheels and key rings with the CIRC logo.

At Franklin Templeton, Ms. Brigevich cleverly leveraged one Christmas season to roll out a new research tool: The *LexisNexis Express Search* service (see page10). An emailed colorful holiday greeting featured reindeer land and the following:

"In the spirit of the holidays, we in the library would like to offer you a tool to help you manage information glut and complement your research efforts. Custom designed by the library with help from LexisNexis, the Express Search service gives you quick and easy access to company, industry, and country news and research material."

Quantify and Document Library Successes

In addition to such creative and playful marketing ideas, librarians that can demonstrate to upper management their accomplishments and return on investment are extremely well positioned. Where possible, quantify successes—headcounts, Web site hits, number of queries fielded, and any other relevant statistics. Anecdotal evidence of success also helps, especially if customers do not object to being quoted.

Every year, Ms. Levy drafts an annual report to *The Baltimore Sun* senior management highlighting new products or tools launched, systems revamped or reorganized, and any statistics she has gathered that illustrate library usage. She discusses specific contributions to high-profile newsroom projects, as well as the library's involvement in significant work outside the *Sun's* newsroom:

- Community service
- Involvement with professional associations such as the Special Libraries Association and the American Library Association, Reforma, and Guild of Book Workers
- Leadership and participation in seminars and continuing education
- Articles or other works published

- Awards won (even internal awards, such as one library staff member's receipt of the company's *Extra Mile Award* for her work on cost-saving restoration of 70 valuable historic *Baltimore Sun* company financial ledgers)

Superior Library Resources Are Essential: World-Class Content, Updated Technologies, and Qualified Staff

The ultimate success of any library hinges upon three basic building blocks:

1. The breadth and depth of subject-specific and other relevant content,
2. Skilled use and application of current technologies, and
3. Well-qualified, continually trained staff members.

In the constantly changing and rapidly evolving knowledge management industry, ensuring superior resources in each of the three above areas is critical, librarians agree.

Almost without saying, all librarians reported that having a collection of high-quality information resources is important. Each said they strive to ensure that the full gamut of relevant sources is available to the organization through the information center and/or via the users' desktop. This task is ongoing, as information needs and resources continually evolve. Tuning into customer needs and suggestions is essential to ensuring accessibility of relevant content.

Some cost-effective ways of providing access to world-class content include the following:

- Ms. Ireland of Freddie Mac has implemented site licenses for a core set of resources; e.g., American Banker Online, *National Mortgage News*, and ABI Inform via ProQuest.

- Third-party content providers at the National Association of Home Builders include *Associations Unlimited: Encyclopedia of Associations and Beyond*; Online Computer Library Center, Inc. (OCLC) FirstSearch; and ICONDA, the International Construction Database managed by SilverPlatter. Association staff can browse all these resources from their own desktops.
- LexisNexis products, used by several librarians interviewed, offer searchable access to as many as 4,000+ news and business sources—a continually expanding list—that all are world-class, reputable outlets.

Whether the library staff numbers three or 20, librarians emphasize careful hiring and ongoing nurturing through regular check-ins and trainings. At MITRE Corporation, where the 20 full- and part-time library professionals are split between two offices, Mr. Shumaker takes several steps to maintain his staff's high quality, reputation, and morale. First, in recruiting, he looks for individuals with initiative, excellent interpersonal skills, and a willingness to learn. Once on board, he devotes time to quality management—while based in the McLean, Va., office, he spends at least one week a month at the Bedford, MA, library facility. In addition, he uses MITRE's video conferencing technology to hold regular full-team meetings of both offices' staffs.

At Freddie Mac, Ms. Ireland's staff consists of just three professional librarians and a paraprofessional who must serve roughly half of Freddie Mac's 4,000+ employees. Nonetheless, this small group boasts an impressive range and depth of research experience in competitive intelligence; legal issues on finance, securities, and intellectual property; human resources management; organizational effectiveness/diversity; information technology; information architecture; facilities engineering; risk management, and personnel/property security technology.

Continual training and professional development for library staff ensures top-flight professional service. Ms. Brigeovich offers her three Franklin Templeton

library employees such opportunities on an ongoing basis. Through such coursework, her library staff members remain up to date on the best online searching methods and techniques, as well as new and improved products and services, so they can best advance their organization's business goals and/or mission. Ms. Levy, who refers to her staff at *The Baltimore Sun* as "the most valuable treasures" she has, encourages their involvement in professional societies such as the Special Libraries Association and American Library Association, among others.

About the White Paper Developers

LexisNexis—a global leader in comprehensive and authoritative legal, news and business information and tailored applications—commissioned a study of six information centers that are leading the way in revolutionizing a library's function and role within an organization. The study was conducted by TFPL, an international information advisory services company.

LexisNexis, having served the business and legal community for more than 25 years, has demonstrated its commitment to the librarians' profession through its outreach programs, leadership symposiums, professional development program sponsorships, and active participation in conferences and seminars. LexisNexis led the way in partnering its own information professional consultants (IPCs) to work with clients in developing customized solutions and services for the clients' organizations.

LexisNexis and TFPL developed a list of study candidates that successfully have met the challenges of change: in content resources, in technology, in managing and delivering information services, and in meeting their organization's business goals. The list was created based on professional and personal knowledge of candidates and by reference and referral. TFPL developed an interview model and visited each site.

LexisNexis is the global leader in comprehensive and authoritative legal, news, and business information and tailored applications. Its online services combine searchable access to over four billion documents from thousands of sources. A member of Reed Elsevier plc (NYSE: ENL; NYSE: RUK), LexisNexis is headquartered in Dayton, Ohio, USA, and does business in 100 countries with 12,000 employees worldwide. The company offers an extensive range of products and customized tools that address job-specific and organization-wide information needs, driving productivity and confident decision-making. LexisNexis recently was named one of *KM World magazine's* "Top 100 Companies in Knowledge Management."

TFPL, Inc., the international information advisory services firm, has also been a leading advocate of the information professional. Its business focus has been to enable organizations to secure optimum value and competitive advantage from their information and knowledge assets.

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