Welcome to the March 2015 issue of AIIP Connections.

In this issue, the Member Spotlight is on Joan Keegan of JAK Research Consultants. The Committee Spotlight is on AIIP’s Industry Relations Committee, chaired by Jan Knight.

We sadly report the passing of AIIP vendor rep and AIIP friend, Bob Schmitt of C3 and SkyMinder. Bob will indeed be missed by our community.

We proudly present an SLA press release announcing two AIIP members – Cindy Shamel and Ulla de Stricker – as interim SLA executives.

Shelly Azar reports on an AIIP regional meet-up event in the St. Louis, Missouri area.

Heather Carine and Ellen Naylor give tips on how to create and maintain local and special-interest groups in your area. The two also provide a list of contacts for groups already in progress.

Susanne Bjørner reports on the American Library Association’s Midwinter Meeting, held in blizzard conditions in Chicago, Illinois this past January.

Ed Vawter gives us a comprehensive overview of AIIP’s upcoming annual conference being held in April in Irvine, California.

AIIP member Mark-Shane Scale gives us a constructive overview of library consulting. His academic-focused article serves as a window into how some library consultants look at themselves and how others look at them.

In her Coach’s Corner, Amelia Kassel reports on web-based company research vendors.

Enjoy the March 2015 issue of AIIP Connections.

See you in Irvine, California.

Joann M. Wleklinski
Editor, AIIP Connections
Welcome . . .

President’s Message for AIIP Connections.

The calendar turns, and I turn to writing the traditional “year in review” column before AIIP seats its new board of directors next month at April’s AIIP Annual Conference in Irvine, California, USA. As always, AIIP’s member volunteers have accomplished remarkable things.

The year’s highlights involve stronger membership value and greater visibility of our profession and our association.

1. AIIP’s webinar team delivered 15 webcasts on topics ranging from data visualization and strategic planning to first-year questions and international business etiquette, with more than 400 live participants.

2. AIIP’s technology volunteers successfully (and, for members, painlessly) implemented a new discussion list platform to connect AIIP’s member community into the future.

3. The AIIP Board established Town Hall meetings to give members more insights into, and more of a voice in, the implementation of AIIP’s strategic direction.

4. AIIP’s board and key volunteers extended the association’s reach by strategically enhancing our online presence and advancing our alliances with other associations in the information and knowledge worker sphere.

Meanwhile, our volunteer teams continue to welcome AIIP’s newest members, to expand the special offers that add power to AIIP members’ suite of sources and services, to publish the journal you’re now reading, to connect mentors and mentees, to develop new metrics for guiding AIIP’s internal operations, and more.

All these activities reflect AIIP’s commitment to advancing the profession, promoting professional standards, bringing information professionals together, promoting the exchange of information among professionals and organizations, and keeping the public informed of who we are and what we do as IIPs.

It’s not practical to thank each of our volunteers here for your work on behalf of AIIP, but it is very much appreciated and I hope fully rewarding to you personally and professionally. It’s been an honor and a pleasure to be with you as part of the action.

Likewise, it’s been a pleasure working with outgoing board members Joann M. Wecklinski (Secretary), Jocelyn Sheppard (Past President), and Charlene Burke (Director, Marketing—Operations). I thank each of you for your dedication, tenacity, and vision on behalf of AIIP, and for your humor in its many forms.

Thanks for consistent excellence are also due to the board members who will continue in their roles next cycle: Michelle Rawl (Director, Membership), Marilyn Harmacek (Treasurer), and Jennifer Burke (Director, Marketing—Content). Special salutations go to June Boyle, transitioning to President from President-elect, whose leadership expertise will take AIIP forward. And, of course, thank you to AIIP’s incoming board members (not yet elected as I write).

Conference Chair Ed Vawter and his conference planning team have set us up for an excellent annual conference experience in Irvine. Read about what’s in store for us and what’s new for 2015’s conference in Ed’s article later in this issue.

The conference is also the time for AIIP’s annual business meeting; in addition, members are welcome to attend the open portion of each of two board meetings. Join us from 3:30 p.m. to 4:30 p.m. (Pacific daylight saving time) on Wednesday, April 15, and from 10:00 a.m. to 11:00 a.m. on Sunday, April 19, after the committee meetings.

Committee meetings? Yes—in fact, this will be AIIP’s second year of holding committee meetings on Sunday morning at the conference. If you’d like to volunteer or just share ideas and suggestions, you’re welcome to drop in. Volunteering is a great way to work and play with other members, share or develop your skills, and shape the future of our esteemed association.

Learn, plan, and grow—words to live by. See you in Irvine and online. Thanks for your support throughout my year as AIIP President.

With warm regards,

Connie Clem

President, AIIP

Clem Information Strategies, Niwot, Colorado USA
A Big Data Guide for Librarians and Information Professionals

By Amy Affelt

“Big Data” is not a new concept for information professionals, but it is spawning new approaches along with a language all its own. In *The Accidental Data Scientist*, Amy Affelt shows information professionals how to leverage their skills and training to master emerging tools, create mission-critical Big Data research deliverables, and discover new opportunities by embracing their inner data scientist.

For more information or to order, visit infotoday.com.

If you’re a librarian or information scientist, this book will introduce you to the key concepts and terminology you need to understand Big Data.”

— Daniel Tunkelang, Head of Search Quality, LinkedIn

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“**A Big Data Guide for Librarians and Information Professionals**”

4 AIIP Connections Volume 29 | No. 1 | March 2015
My first job was shelving books in the children’s department at my local public library but when it came time to choose a college major, for some reason it never occurred to me to pursue librarianship as a career. In high school, I was good in both math and French, and decided to go with math as my college major, figuring it would provide more job opportunities. I started work at Bell Laboratories when I graduated, providing programming support for telephone network analysis back in the early 1970s. Computers were still big enough to fill a room, programming was done using punched cards, and you could wait hours (or even overnight) for your job to be run by the operators behind the counter. While working there, I realized that I loved the programming aspect of my job and decided to go back for a master’s in computer science. Over the next 30+ years, I worked in all stages of software development, including requirements gathering, design, development, testing, training, and documentation. Looking back, I realize now that the work I enjoyed most revolved around databases and how information is organized, stored, and retrieved.

Fast forward to 2007, when I got fed up with the corporate world and decided to retire and just go work in a library (again). Curiosity led me to Rutgers to talk about a library science degree. They convinced me to pursue an MLIS where I could combine my computer skills with information science in the field of library science, which was becoming more and more technology based. During my studies, I fell in love with searching (dare I say it? I LOVED Dialog.) I found myself constantly drawn to more of the information and data aspects of library and information science, perhaps because of my experience working with databases all those years at the Labs. I was no longer sure working on a reference desk was where I wanted to be. Then, funding for public libraries dried up in New Jersey while I was getting my degree. I started thinking outside the box about what kind of job I could find that would allow me to use both my technical and information skills. Along came an internship doing secondary research in support of competitive intelligence (CI) in a big pharma firm. I was able to parlay the full-time internship into a part-time contracting position, so I set up my own LLC. Two days a week became three, providing a nice core business for my “retirement job.”

I love what I do. Simply speaking, for this client I am an embedded librarian—the dedicated expert researcher for the CI team. Although there is an organization that does research for the entire company, as an embedded librarian, I am able to focus on the team’s specific needs 100% of the time and get fast turnaround. This sometimes leads to my working in a firefighting mode, as well as having to juggle multiple tasks and do a lot of context switching. But that can be positive as well—no two days are ever the same, and I love that aspect of my job. I can be researching clinical trials one day, compiling an executive or company profile the next, and pulling together a competitive landscape for a specific disease on the third. So, I’m never bored, and I’m always learning.

In addition to using subscription databases, I spend a fair amount of time searching for information in the public domain. It’s amazing what you can find out there. For example, recently I located two foreign documents that were of great value to the client, and they would never have been found in a clinical trials database. It’s finding gems like these, and having people ask “How did you FIND that?!” that makes my job so rewarding. It’s also going to make it difficult for me to actually retire.
I have also used my computer skills to expand my role beyond that of a traditional librarian who locates and assesses the value of sources, performs research, and organizes information found into succinct yet detailed reports. I’ve become the resident techie for the team; the go-to person for computer- and software-related issues or questions. I enjoy the added diversity and the chance to take advantage of my years of experience as a software engineer. I believe that computer/database skills, especially understanding how data can be merged and normalized, are becoming more valuable. This is particularly true in today’s big data environment with its 4 Vs: volume, velocity, variety, and veracity. It is important that we as info pros be comfortable working in that space. It’s also important that we have at least a basic understanding of data mining, which I think is becoming less of a “nice to have” and more of a “must know” skill.

I continue to be impressed by the wealth of knowledge shared among AIIP members, and the true camaraderie I see in the postings on the member list AIIP-L. I was looking forward to attending my first AIIP conference this year, but instead I will be heading north to watch my daughter run the Boston Marathon (her first) as part of the Dana Farber Marathon Challenge to raise funds for cancer research (myself a survivor). So hopefully I’ll meet some of you at the SLA conference in June, and I’ll see you all at the AIIP conference in 2016!

Joan Keegan owns JAK Research Consultants, LLC. Contact her at JAKResearch@verizon.net.

In Memoriam

Robert Schmitt
C² and SkyMinder

AIIP notes the passing of Robert Schmitt. Bob was well known to the AIIP community as the founder of C² Business Information, Inc., and SkyMinder, a regular participant in the AIIP Annual Conference, a good friend to AIIP, and a great guy.

Donations in Bob’s memory can be made to either the Moffitt Cancer Center in Tampa, Florida, or Marty’s Place Senior Dog Sanctuary in Spring Lake, New Jersey.

MEMBER SPOTLIGHT
As the current Chair of the Industry Relations committee, I think (though slightly biased?) that serving on this particular committee can be one of the more interesting ways for AIIP members to volunteer. I’ll explain why.

**What is the Industry Relations committee?**

The committee has responsibility not only for bringing in vendors whose products and services can provide benefit to our members, but also for helping those vendors, over time, to market themselves to AIIP members to ensure a mutually beneficial relationship.

Traditionally, vendor companies have tended to provide research tools and databases, for example, LexisNexis and ProQuest Dialog. As the makeup of our membership changes, we are also looking for other types of vendors who can provide value in alternative ways. One of our vendors, MNB, offers an email newsletter tool, MyNewsletterBuilder. Most recently we welcomed the opportunity to offer members discounted subscriptions to summaries of business books through The Business Source. Log in to the member side of the AIIP website and check out [aiip.org/Members-Only/Partner-Affiliate-Program](http://aiip.org/Members-Only/Partner-Affiliate-Program) in the Members Only section for the specifics of all current vendor partners and affiliates.

**Mutual Benefits**

In order for a vendor to be considered for the program, it must provide some level of discount on its services and products for AIIP members. Many provide reductions on annual fees or discounts on searching.

In return, vendors receive a number of benefits that encourage them to make members aware of their services. These benefits include holding a member-only webinar on their product, the privilege of emailing the membership, the option of placing an ad in AIIP Connections, and training opportunities at the annual conference at no additional fee. In some cases, vendors may also exhibit at the conference at a reduced fee.

**Committee Challenges**

For the last few years, we on the Industry Relations committee have faced two primary challenges.

1. “If they offer it, we will come.” Some vendors seem to believe that because they offer a good discount they do not need to market those arrangements. They may not take advantage of the benefits we offer them to help create product awareness. Sometimes representatives on the vendor side change, and it may be that the new individuals are just not aware of them.

2. Members do not know that AIIP has such good deals. Our members aren’t always aware of the special relationships that AIIP has arranged. At last year’s conference, I held a Table Tips session on the topic and provided a two-sided list of our current vendor partners and affiliates. Many long-time members, in addition to newer ones, mentioned that they weren’t aware of the diversity, quality, and quantity of the vendor offerings.

Over the years, as the number of vendors has grown, the committee membership has had to increase. We now have a handful of committee members who act as liaisons to a small group of vendors. We think of this as our ongoing effort at customer service. We want these vendors to stay around and continue to provide value to AIIP members.

We also have more work to do in helping our members become aware of the vendors we partner with. Currently we focus on occasional updates to the AIIP-L list, webinars, ads, visibility at the conference, and articles such as this to increase member awareness.

**How You Can Help**

We on the committee believe that there are many roles to play, and not everyone warms up to all of them. If you’re the kind of person who likes to approach, and negotiate with, new potential vendors, that’s great. If you’d rather not do that but would feel more comfortable working with specific vendors in the customer service liaison role mentioned above, that’s good, too. We’d love to have more of you to help!

As I mentioned up front, I feel the Industry Relations committee is one of the most interesting of the AIIP committees. It provides an opportunity to get to know a variety of vendors, to demo new products, and to discuss what you personally would find useful to your own business. Moreover, membership on this committee allows you to be part of an AIIP benefit that for many years has been considered a great reason for belonging to AIIP.

Feel free to contact me at [jan@bancroftinfo.com](mailto:jan@bancroftinfo.com) if you are interested in participating.
EDITOR’S NOTE: The following article is a press release issued by SLA. Since it involves two AIIP members, we wanted to make sure you were aware of the news.

Alexandria, Virginia, 13 January 2015 —The SLA Board of Directors has tapped two longtime association members with extensive experience in strategic consulting to serve as interim executives and help keep SLA moving forward until a permanent executive is hired.

Cindy Shamel, head of Shamel Information Services in Poway, California, will serve as interim executive director. Ulla de Stricker, president of de Stricker Associates in Toronto, will serve as interim strategic director.

Cindy and Ulla, who have collaborated on several consulting projects in the past, were selected from among five individuals and teams that expressed interest in working with the SLA Board and staff to develop and implement ideas to maximize benefits to members. They will report regularly to the SLA Board and the Executive Committee on their progress in identifying opportunities in the areas of marketplace positioning and viability, membership and revenue growth, organizational structure, and conference modeling.

The agreement with de Stricker and Shamel is for one year, though the SLA Board has the option to extend the contract if it believes that doing so would be in the association’s best interests.

“We are excited about the opportunities, but cognizant that we are only in the beginning stage of a transformation that will require concerted and lasting effort,” the two consultants said. “We look forward to working with the SLA staff to serve the association and its members.”

The two will attend the SLA Leadership Summit in Baltimore later this month. After the Summit, they will visit SLA headquarters in Alexandria, Virginia, which is close to Baltimore.

Cindy and Ulla were recommended to the SLA Board by a Transition Committee assembled in 2014 by then-SLA President Kate Arnold. The committee was formed to help ensure a smooth progression to new operational leadership beginning in 2015. The committee members are Jill Strand, SLA’s president; John DiGilio, SLA’s treasurer; Tara Murray, past division cabinet chair on the SLA Board; Debbie Schachter, a former member of the SLA Board; and Bill Noorlander, a member of SLA’s Finance Committee.

With the hiring of de Stricker and Shamel, the Transition Committee will now turn its attention to fulfilling its other responsibilities, as follows:

• To prepare a plan for hiring a new executive officer, including a recommendation on the charge for a Search Committee;
• To develop a draft compensation and executive officer review policy; and
• To develop a communications plan in collaboration with SLA staff.

“There is still much work to do during this transition period, but I am excited that we now have two people with a track record of consulting success to act as change agents and help the board continue moving SLA forward,” Jill Strand said. “The Transition Committee and the SLA Board are confident that Cindy and Ulla will have a positive and long-lasting impact on our operations.”

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See more at: www.sla.org/about-sla/mediaroom/press-releases/board-names-de-stricker-shamel-interim-executives/
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AIIP has more than 400 info entrepreneur members located in over 20 countries around the world.

Between annual conferences, a regular catch-up with info entrepreneurs in your local area is a great way to build your connections, develop your info entrepreneur expertise, and help one another to grow your businesses.

Here are 10 tips to help you to kick-start or maintain a local group in your area.

#1 Reach out to your neighbours

Your AIIP neighbours may be in your city, state, country or region. In Colorado, the I-25ers have been gathering for a long while and meet every few months. In the Asia-Pacific region, the AIIP down-under members from Singapore, Australia, and New Zealand have an online meet-up every few months.

#2 Take the lead

To set up a group, all you need is someone to take the lead to organize the first meeting. You simply set a date and time, find a venue, and announce it on AIIP-L.

#3 Host a meeting

The aforementioned I-25ers group meets up every few months. They have found the most convenient time to meet is on a Saturday from 10:00 a.m. to noon, and usually meet at the home of one of the group, taking turns to host the gathering.

#4 Schedule online meet-ups

For online meet-ups, the meetings work well if they are less than one hour in length, and the meeting is held at a convenient date and time during the week.

#5 Start each meeting with introductions

There are usually first-timers coming along to most meetings, so it is a good idea to start each meeting with brief one-to-two-minute personal introductions and descriptions of what attendees are focussing on developing in their businesses.

#6 Set talking points

Each meeting should have a few talking points on the agenda that are relevant to independent information professionals. Talking points could include managing clients, marketing, managing cash flow, negotiating fees and raising rates, and so on.

#7 Keep it going

Once you have come together locally for your first meeting, you will want to keep the momentum going. A realistic timeframe is to have a meeting every few months.

#8 Consider special interest groups

The tips for organizing a local group meeting work just as well if you want to set up a special interest group (SIG). You may be scattered across the world, so for a SIG an online meet-up using Skype or Google Hangouts will work well.

#9 Remember—it is simple and rewarding

A regular hangout, meet-up, catch-up or coffee with people who, like you, think about the challenges of running a one-person information business is very rewarding, and takes minimal time to arrange.

#10 Chat with the local groups’ co-chairs

If you would like some further tips for local groups, contact Ellen Naylor or Heather Carine.

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(as of Jan 2015)

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Local Non-U.S. AIIP Coordinators
(as of Mar 2014)
One of my mainstays in recent years has been the acquisition and supply of pens, notebooks, flash drives, and related supplies. Not to mention replenishing my digital books, e-readers, and tracking Spanish-language ebook deployments. I also have been involved in setting up presentations on three different platforms for the tasks I had set for myself in comparing conference themes, “The Conversation Starts Here...”

ALAMW15

ALA is infamous for placing its conferences in cold venues in the winter and warm ones in the summer, and still managing to attract 10,000 or more participants in January and 20,000 or more at the annual June meeting. The 2015 Midwinter Meeting & Exhibits happened at McCormick Place, and several hotels in Chicago, Illinois, needed to accommodate the 1,800 committee meetings, presentations, events, and social gatherings. As it turned out this year, about one third of the attendees were exhibitors; that proved to be an advantage for me, as a blizzard came through the city on Sunday, making transportation from hotels to convention center difficult, even for the free Gale Buses. Though exhibit hall traffic was sparse, booths were well staffed (most exhibitors stay at the adjoining convention center hotel); the conference theme, “The Conversation Starts Here...” was carried out on the B2B level on the exhibits floor. I was able to accomplish most of the tasks I had set for myself in comparing content presentation on three different platforms and tracking Spanish-language ebook deployment. Not to mention replenishing my decimated supply of pens, notebooks, flash drives, and other gadgets.

One of my mainstays in recent years has been the Friday afternoon OCLC Symposium, which usually offers two or three knowledgeable and innovative speakers on a broad and important topic, and ends with an ice-cream break. By attending this symposium, I always have the feeling that I have learned something even before the conference officially starts at 5:30 p.m., plus it is probably the longest and most thought-provoking sit-down time I have in the four days of the show. I was disappointed in the session this year, feeling that this time OCLC was less forward-thinking and more navel-gazing. Two speakers presented tidbits from six projects of OCLC’s own current research, but none was as substantive as prior symposia topics.

Lessons on Leadership

Because public, K-12, academic, government, and special collections librarians are all well represented at ALA, there is always a huge variety of authors to be heard, advanced galley books to be picked up, and the serendipitous inspirational program to drop in on. I didn’t find John Grisham or Isabel Allende this year, but I arranged to meet a colleague at a presentation on leadership by Scott Bonner, the director of the Ferguson (Missouri) Public Library, and I was glad I did. Bonner had come to Ferguson as library director and its only full-time librarian just a month before the turmoil sparked by the fatal shooting of Michael Brown on August 9, 2014. In his low-key presentation to a packed room of 300, he outlined four decision points that had been forced upon him throughout several months of crisis. The first was whether the library should open for business on the day immediately following the death of Brown and initial unrest. A second point was how to respond to teachers from the community who asked to use the library as an alternative schoolroom when municipal schools were closed for more than a week in the early days of the siege. He had to again decide whether to remain open or close the library when the grand jury decision came down and rioting erupted again. Then he had to determine how to respond to a request to mount an uncensored art exhibition about the Ferguson situation as seen by numerous artists.

Bonner’s session was a lesson in how to organize an engaging presentation as well as how to teach leadership. For each decision point he presented background facts; the audience was then able to ask clarifying questions, which he answered briefly and factually. Then he asked a yes/no question on whether to take the stated action. The question was simply, what would you have done? There were no right or wrong answers; after we raised our hands to indicate our choice, Bonner told us what he did, and whether he was now glad about the decision or not. He wasn’t, always. His talk was calm, humble, and objective. It was possible to see why he was able to keep the library as a neutral and safe haven, generally open throughout the crisis and now (hopefully) afterward, serving all citizens of his diverse community. And it was an excellent exercise in executive decision-making.

Scott Bonner spoke as part of an ALA initiative on Libraries Transforming Communities, which is funded by the Bill & Melinda Gates Foundation. More information is available at www.ala.org/transforminglibraries/libraries-transforming-communities/blog/ferguson-library-director-gets-standing-ovation-ala-2015. A full conference wrap-up can be found at http://www.ala.org/news/press-releases/2015/02/2015-ala-midwinter-meeting-exhibits-thousands-attendees-conversations-and, with links to other views.

www.bjørner.info (www.bjørner.info; bjørner@earthlink.net) is a founding member, past president, and new emeritus member of AIIP. She currently lives in Cincinnati, Ohio, where she provides editorial and publishing services to a long-standing client.
One of the highlights of being an AIIP member is the chance to attend AIIP’s annual conference. Personally, I’ve been to every conference since 2004 in Austin, Texas. The conference is a fantastic opportunity to get caught up with friends and colleagues and have the chance to learn something new that can then be applied to our own businesses, plan how we’re going to achieve those results, and from those efforts watch our businesses grow.

This year, the conference planning committee has added a few new events to the conference program while keeping those events that are popular – and perhaps freshening them up a bit.

What’s New

This year AIIP will be meeting in Irvine in sunny, warm southern California. We’re planning to take advantage of the expected great weather (April 2014’s average temps were 69°F for a high and 60°F for a low), and hold several conference events outdoors.

Outdoor Events

1. For the first time in the history of the annual conference, the Awards Dinner (and accompanying complimentary headshot photo session) will be held outside on the Hotel Irvine’s new Backyard, the hotel’s brand new 8,000 square foot lawn area.
2. For the first time since the annual conference of 2009 (Albuquerque, NM), the Tips on the Terrace session will be held outdoors – on a real terrace.
3. An ice cream social – also to be held outdoors – on Friday evening after the no-host dine-areounds on the hotel’s Theatre Terrace has been added to the schedule.
4. The continental breakfast on Saturday morning will be served also on the hotel’s Theater Terrace.
5. Coffee and pastries will be served and committee meetings will be held on Sunday morning on the hotel’s Traubuco Terrace – again, outdoors.

Special Comfy-Couch Session with Roger Summit and Libby Trudell

Another highlight at the conference this year will be a special session featuring our Roger Summit Lecturer Libby Trudell, a former Dialog/Proquest VP, along with Roger Summit, himself. I will be moderating this comfy-couch session, asking our two guests about their experiences as early information professionals and what advice they have for those info pros in the audience. There will be a chance for attendees to ask questions as well. You won’t want to miss this session.

Workshops and Vendor Training on Thursday

Another conference tweak is the absence of a full day dedicated to pre-conference workshops. This year, the workshops – along with vendor training – will take place on Thursday, the first full day of the conference and the day we’ve designated as our Learning day. AIIP’s board members, who in the past have met on the Thursday of conference week, will be holding their meeting on Wednesday (yet another tweak to the annual conference), which gives them a chance to participate in Thursday’s Learning day. The collapsed conference schedule aims to make the conference more affordable and well-attended with less hotel nights and days away from the office needed to participate.

Ice Cream Social

As earlier mentioned, the conference this year will have an ice cream social as another opportunity to informally get together and network.
with your fellow AIIP attendees. The committee felt holding the social after the popular Dine-Around event would allow for a sweet treat and a chance to wind down the second full day of the conference.

**AIIP15 app**

At this year’s conference, AIIP will take full advantage of an iOS and Android application – AIIP15 – to have a complete program with schedule, map, speakers, planning committee, and board members, plus other useful information available. There will also be the ability to post pictures and share messages with others using the app. The committee hopes the technology will improve the conference experience and put the information you need right at your fingertips. We will also have the ability to make announcements to all attendees using the app if there is some change in the schedule or to send reminders when sessions are starting.

Some of the other sections in the AIIP15 app are links to helpful information, hotel information, a list of our sponsors and exhibitors, and attractions and sights in and around Irvine. Be sure to download the app before you travel as there is a helpful “Preparing for AIIP15” section to assist you in deciding what clothes to pack and what items to bring to the conference. There’s also a link to AIIP member Mark Goldstein’s Flickr photo set from AIIP’s 2014 annual conference so you can get a sense of the event, should this be your first annual conference foray.

You can download the AIIP15 app by visiting this link on your phone or tablet: my.yapp.us/AIIP15. The app is for iOS and Android; unfortunately Yapp does not currently have a Windows Mobile version.

**Social Media Outreach**

The conference committee is also planning to take full advantage of social media at the 2015 annual conference. For those not able to attend the conference, there will be a daily digital newspaper with highlights of each day available via Paper.li at http://bit.ly/AIIP15News. Currently updated weekly, a daily update will commence at the beginning of the conference. The paper will include Tweets from attendees, posts to Facebook or Google+, photos, and information from our sponsors and vendors.

Another new twist we’re adding to the conference experience this year is a continually updating Tweet wall which will display social media messages about AIIP15 on the screen between sessions. While not every AIIP member may be a social media devotee, the hope is that conference attendees will enjoy – and get benefit from – seeing what other members post during the conference.

Speaking of social media, if you want to see what the Hotel Irvine is all about, the hotel has an Instagram, (https://instagram.com/hotelirvine), Twitter (https://twitter.com/HotelIrvine), Facebook (https://www.facebook.com/HotelIrvine), and Pinterest (http://www.pinterest.com/hotelirvine).

**Other Tweaks**

Door prizes are another popular feature of the annual conference. While everyone likes winning prizes, this year’s awarding of prizes will have a twist: instead of simply drawing the random winning name, we’ll be asking random questions — with the goal being to help you learn a little something about your fellow attendees. Here are some sample questions:

- Who has been in business the longest?
- Who travelled the furthest to get to the conference?
- Whose business has the fewest letters in its name?

Member Introductions is yet another popular – and important – part of the AIIP conference experience, where on Friday morning we have each member give a 30-second introduction that provides a succinct description of their company. This year, in addition to giving a succinct company description, we will be asking each member to mention either one thing they are looking to learn or a business area they would like to improve while at the AIIP conference. This gives fellow attendees—who may have knowledge or experience with the mentioned topic(s)—a chance to know who to contact for informal discussion. It’s another way for AIIP members to learn more about — and help — one another.

We on the conference committee hope that all attendees will find at the conference something new they enjoy — which in turn will make the 2015 AIIP Annual Conference, and our businesses, an enjoyable success.

**See you in Irvine!**

Ed Vawter, the principal of QD Information Services, LLC, is the Conference Coordinator for the 2015 annual AIIP Conference. Contact him at evawter@gmail.com or www.qdinformation.com.
Library Consulting: Constructing an Overview
By Mark-Shane Scale

“Having this new lens, we see that technology firms like OCLC and other library management vendors are library technology consulting firms.”

This is the first of two articles in this issue looking at the topic of library consultants and library consulting. Both articles are based on doctoral research that I am currently completing at the Faculty of Information and Media Studies at the University of Western Ontario. Part 1 focuses on the boundaries of library consulting and who is a library consultant.

Background

In doing my research, I found that library consulting is often twinned with information consulting. LIS professionals like Ulla de Stricker (2008) indicate that library and information consulting is a broad concept that includes work done by consultants who are not necessarily formally educated as librarians but provide advisory services relating to libraries or to the management, organization and provision of information. In both library and information consulting, some consultants are formally educated in librarianship, while others possess informal qualifications from experience or expertise in working within library settings, from which they offer library-related expertise and services. Further, de Stricker defines library and information consulting as consisting both of librarians offering “skills to a variety of clients (not necessarily libraries)” and of “other types of professionals (e.g. architects, staff training experts)” offering services to “libraries and library-like entities” (p. vi). Regardless of the fact that library consultants are either library professionals or other professionals, both groups constitute an expanding library and information consulting sector.

Consultants, I think there is great value in separating the terms for analysis. This is because library and information consultants are two distinct groups. For example, Gilchrist (1999) classifies library and information consultants into a) library consultants and b) information consultants or information brokers. It is further mentioned by Feather and Sturges (2003) that distinguishing the consultant from the information broker is seldom clear. Yet, according to Prytherch (2005), the term information consultant generically refers to “self-employed freelance individuals operating on a commercial basis in the areas of information handling, research, data handling and related fields” (p. 350). On the other hand, library consultants are narrowly defined as individuals offering “a range of professional skills and advice relevant to the operation of libraries” (p. 420). These “[f]ree-lance self-employed” individuals in turn market their skills “on a commercial basis” to the libraries concerned “on contract for a fee” (p. 420).

Considering these distinctions, I distinguish library consultants from information consultants and study library consultants separately. I focus on library consultants, who appear to be the less documented of the two. For example, Broughton, Blackburn, and Vickers (1991) cite at least two surveys on information consultants and information brokers. Unfortunately, I have found no such equivalent studies for library consultants.

Another problem that I have seen is that there is currently a controversy as to whether or not library consulting is the same as freelancing and outsourcing. According to Gordon (2008), the “line between freelance, contract and consulting work is very thin, and many people use the terms as interchangeable” (p.87). However, Gordon insists that the terms are not synonymous, with freelance work usually referring to very short-term work on a well-defined project, while contract work involves longer-term commitment and more complex activities, and consulting involves work at a more strategic level. Gordon summarizes that in any of these cases, library consultants provide outsourcing services to libraries.

Likewise, de Stricker (2008) distinguishes between freelancing and consulting. According to de Stricker, freelancing involves an outsider librarian temporarily working, due to unavailability of full-time staff, as a pair of hands to do librarian work or a special-purpose library work assignment or project. On the other hand, she sees consulting as a process of entering into an organization with an outsider’s perspective, using professional experience to guide clients and recommending the best course of action, given the situation at hand.

Rawles and Wessells (2004) propose that library consultants are brought into libraries to deal with changes in the external environment to which libraries need to adapt. For Rawles and Wessells, library consultants undertake a professional “helping and facilitating process” in order to help clients “bring about change and solve problems” in libraries (p. 3). Blasingame (1969), in agreement, suggests that the library consultant represents “a shortcut to new, expanded or updated (library) facilities or programs” (Purpose of a consultant, para 1). Feather and Sturges (2003), as mentioned before, are of the view that “consultants” do more than provide information, but also offer a “detached, objective view of an organization’s problems and needs while recommending and occasionally implementing fresh solutions for a fee” (p. 105). Genway (1992) also attempts to demystify library consultants and the practice of library consulting by defining a library consultant as a person “who gives professional advice, analyzes problems and makes recommendations for solving them, provides short-term staff training sessions, or negotiates the best price from vendors” (p. 30).
Despite the wonderful work done by LIS professionals to demystify library consulting, there is still need to unpack the present meaning of the term. Much of what is previously discussed is focused on self-employed external library consultants and is a bit dated. One thing to note is that the self-employed library consultant is only one type of consultant in a wider spectrum of library consultants that includes:

- technology firms that offer outsourced products and services
- internal consultants, and
- large consulting firms

In my reading of the literature, there seems to be some overlap between the work of self-employed external consultants and institutionally employed internal consultants. In discussing the duties of the internal academic library consultant, Kaspar and vanDuinkerken (2014) suggest that the internal consultant is responsible for work that improves the library rather than maintaining the status quo, while playing other roles as needed. Kaspar and vanDuinkerken say that such an internal consultant must be flexible to take on various roles on an as-needed basis including:

- Addressing a special situation
- Undertaking infrequent special projects
- Kick-starting a new initiative
- Dealing with unpleasant situations or problems
- Liaising and facilitating between various departments or between management and the frontline.

Further, Kaspar and vanDuinkerken see the use of internal consultants as the “best way” for libraries to succeed in a changing work environment.

It is therefore evident from the literature that understanding what constitutes library consulting work is emergent. It is also clear that ongoing research is needed to further clarify the distinctions between outsourcing, freelancing, and consulting. This brings us to my attempt to define library consulting.

Defining Library Consulting

To define library consulting, I examined several models of consulting in the general business and management literature (Filley, 1995a; Filley 1995b; Stroh & Johnson, 2006; Block, 2011). Essentially consulting consists of two parties, a client (who uses the services, advice, or product that offers technical solutions) and a consultant (the provider of services, advice, or product offering technical solutions), who interact with each other formally based on a contract (an agreement to deliver services, advice, or technical solutions). However, what distinguishes library consulting from general consulting is that the services, advice, or technical solutions are intended to be applied in libraries or in institutions that operate libraries (or by clients that operate libraries).

Why Does Defining Library Consulting Matter?

Thinking about library consulting as different from information consulting and even part-time library work can help us to further delineate the structure of the library consulting sector and identify who are the players in this sector. By limiting our analysis to those who offer services to libraries or institutions that operate libraries or for clients who work in libraries, we are able to have a clearer picture of the industry. Having this new lens, we see that technology firms like OCLC and other library management vendors are library technology consulting firms. In addition, we can also see that independent library consultants compete with general and large management consulting firms. All this can provide us with a better perspective of how to position ourselves as small businesses against an industry that has many large firms.

References


I’m seeing more and more web companies geared to specific target markets rather than geared to info pros but potentially useful for company and industry research about start-up businesses. You won’t necessarily know about these companies because they don’t market their services to the information industry. These companies are typically start-ups themselves and operated by young, highly educated teams of sophisticated entrepreneurs who are technology-savvy. Info pros can easily take advantage of free services, or as needed subscribe to some of the value-added services which offer more sophisticated search and filtering features. Some are likely too pricey for IIPs unless your clients have ongoing needs that will cover your costs, but are still worth knowing about. At a minimum, I recommend subscribing to the free newsletters and blogs which cover companies and industries.

Since these companies are evolving in terms of content, features, and pricing as they build out services, it’s important to monitor changes and new offerings. One company, DataFox, has changed (read increased) its pricing three times since I first learned about it last year. But, it continues to add valuable features, making it possible to answer complex questions or generate names of companies for specific purposes. Another company, CrunchBase, used to offer free monthly downloads without registration but now requires registration and limits types of users who can access the data. Here’s a brief description of a few of the companies I find interesting. You can dig more deeply into their websites to learn more—and there is more to learn. Be sure to sign up for a trial account for those that are subscription-based:

**CB Insights**
www.cbinsights.com

CB Insights bills itself as a venture capital database that helps you track the world’s most promising private companies, their investors, their acquirers, and the industries they compete in. The company provides a free newsletter that contains pithy commentary and a free trial. Pricing is not insignificant. Consult pricing options with features at www.cbinsights.com/pricing.

**CrunchBase**
info.crunchbase.com/about/

CrunchBase has been around since 2007 and is free. The database covers
approximately 650,000 company profiles. Data is maintained by “tens of thousands of contributors.” A subset of the CrunchBase dataset in Excel is available monthly, making it possible to drill down into the history of startups and, according to the company, formulate insights on the evolution of industries. The Excel downloads, once available without restriction, are currently available to academics, journalists, government agencies, and members of the CrunchBase Venture Program or can be licensed for commercial use. The Excel spreadsheet includes:

- Companies which have reported raising money
- Investors (individual and institutional)
- Funding rounds

For details about downloading go to info.crunchbase.com/about/crunchbase-data-exports/

**DataFox**
www.datafox.co/

The DataFox website headline is: “Deal sourcing and monitoring for the technology sector” and explains:

DataFox is your radar for tracking the complex technology market. Get access to the real-time data you need about private tech companies, enabling you to prospect for qualified leads, understand market trends, and be the first to know when key milestones are uncovered.

The DataFox dataset has grown considerably in the last six months and consists of 500,000 companies, both private and public, with names of competitors, investors, funding rounds, and more. DataFox crawls the web, tracks RSS feeds and YouTube, and purchases public market data and data accessed through other API partners including CrunchBase, AngelList, LinkedIn, Alexa, and others. The company has created algorithms to surface new information such as top competitors. Users are asked to improve the data by flagging things they know to be wrong. DataFox makes it possible to:

- Generate names of target companies by sector, product category, location, or investor
- Uncover high-growth companies
- Filter results by headcount, estimated revenues, or funding
- Access data from “millions of news articles, press releases, job listings, and government filings”
- Find competitive information, recruiting trends, web metrics, fundraising history, and names of key executives

**Owler**
www.owler.com/iaApp/home.htm

I love Owler, which was founded by Jim Fowler of Jigsaw fame. You can use it to search for or track public and private companies. Owler sends you press releases and news from multiple sources daily about your selected companies, thereby keeping you current on activities of companies of interest to you or your clients. According to the company, it keeps you up to date by providing hand-curated, real-time updates about your companies and competitors along with exclusive company insights from the Owler community.

Company profiles include:

- A brief overview of each company
- Funding and Acquisitions
- News
- Polls

You can review existing polls about a company or create your own. Polls are useful as a form of social media market research.

**Rock Health**
www.rockhealth.com

If interested in the business of health care, the Rock Health Digital Health Funding database is important to know about. Rock Health states that its health funding database can be used to help identify potential targets for acquisition or business development, assess competitors, or develop management reports and analyses on digital health. The annual subscription price is $1,999 and includes:

- Historic data from 2011-2014, including details on over 500 funded digital health companies (sortable by amount raised, category/segment, location, founding year, number of employees, and CEO demographics)
- Profiles of digital health investors
- Funding updates through Q4 2015 (quarterly spreadsheet of latest deals)
- PDF copies of 2015 Rock Reports, featuring recent research in digital health
- Quarterly webinars covering digital health funding trends

A free sample of funding data is available at rockhealth.com/resources/digital-health-funding-database/#gf_1. Off-the-shelf reports are $99.00 each.

**VBProfiles**
www.vbprofiles.com/

VBProfiles is a partnership between the Spokeintel Network and VentureBeat and is free. Its website invites you to track the companies, people, technologies, and trends shaping your industry every day. The initial database included 20,000 entities, but the home page states that you can search 6+ million profiles. “If the profile you are looking for doesn’t exist,” it says, “create it and we will curate it.”

You can find the latest company information, including executive profiles, company milestones, industry trends, news, blog posts, and much more, follow public and private lists of companies created by thought leaders, or create your own lists of companies to track. Featured lists are:

- Marketing Technology Landscape
- Big Data Universe List of Lists
- Industrial Internet
- Business Intelligence
- Mobile

**Amelia Kassel** is President of MarketingBase, a global firm specializing in industry, company and competitive and market intelligence research. Amelia operates The Mentor Program for new research professionals and those wishing to expand. Contact Amelia at amelia@marketingbase.com or www.marketingbase.com.