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FROM THE EDITOR

Welcome to the December 2016 issue of AIIP Connections.

As 2016 winds down, my business is reaching its end of fiscal year. On top of preparing financial records for the accountant, I’m also thinking ahead to 2017, considering new opportunities to improve my services and myself.

This latest issue is full of inspiration. AIIP President Jane Langeman, reminisces about her beginnings as an independent information professional and the role AIIP played in building her confidence and expertise.

President-Elect Scott Attenborough shines the Volunteer Spotlight on Becky Leung and Jennifer Pflaumer. Becky and Jennifer brought their leadership, as well as analytic and technical skills, to the task of upgrading AIIP’s video hosting platform. Could volunteering help you to fine-tune your skills?

Cathy Heath will inspire you to develop a virtual meet-up group. She shares the experiences of the Asia Pacific Group and offers recommendations for success.

Are you ready to get serious about social media as a marketing tool? Scott Attenborough reports on the new AIIP social media marketing SIG.

AllPeer Review presents 17hats thanks to Jennifer Wegman. This multi-function productivity tool can help a small business owner juggle the various tasks associated with project management.

Penny Cross reports on her experience at the 2016 Internet Librarian International Conference, held in London, UK. She shares some of what she learned that is relevant to information professionals.

We are starting to see discussions on AIIP-L about flights to New Orleans for the annual conference in May 2017. If you’re still on the fence about booking your flight, check out Ruth Thaler-Carter’s review of the benefits of conference attendance. Maybe you’re considering a romantic side trip or planning to bring family with you. Ruth also reports on some hot spots for dining and entertainment, plus she notes activities to keep the family busy while you attend sessions.

Are you thinking about how to upgrade your skills through courses or additional credentials? New AIIP member Dan Odenwald, has polled his fellow members and tells us about the benefits and challenges of hitting the books as a mid-career professional.

Finally, teaming up with another AIIP member offers a different kind of learning experience. Karen Klein outlines the project she shared with Michelle Rawl and offers some lessons learned to help the rest of us.

Let AIIP Connections inspire you as you look forward to whatever 2017 holds in store.

Phyllis Smith
Editor, AIIP Connections
Halton Hills, Ontario, Canada
“All beginnings are hard”

CHAIM POTOK, In the Beginning

Y

ou can read all the books you want, but learning from people who have been where you are is a way to fasttrack your efforts, circumvent mistakes, leapfrog disappointment and grab on to inspiration. But, I’m getting ahead of myself.

I had a great job and career in corporate IT, or Information Technology. I loved coding; I loved leading. My first work memory was, “They are paying me to have fun!” It changed when, after many years, I found myself mired in bureaucracy. Where did the love go? I know myself, and I don’t do boredom well.

I decided I needed to pivot, to change my circumstances. After researching options, computer science and library science seemed a perfect marriage so I enrolled in the University of Denver’s master’s program in Library & Information Science. Simultaneously clueless and joyful, I shed my IT skin and met a wonderful community of people with adjacent interests. I continued working in IT as I molted to a middle-aged student.

I can only laugh when I think of my first assignment to write about OPACS (online public access catalogs). I didn’t know what OPAC was, and wondered what tie OPEC had with library science. It was the first of many laughable mistakes. I didn’t know where I was going but I found that I could chart my own course in graduate school. The freedom to learn was intoxicating.

Pivoting a bit more, I took library science guru Kim Dority’s class on alternate careers. She brought in speakers with diverse information professional jobs that spanned the horizon. I remember the day Mary Ellen Bates, Marcy Phelps and Christine Hamilton-Pennell were the speakers, talking about their independent businesses as infopreneurs. They were honest, encouraging and even challenging. I was hooked and determined to get to know these women. They had what I wanted—control over their own destinies.

After joining AIIP as a student member, I began attending local networking meetings. Was I out of my league? Without a doubt. But, I came back again and again and met other AIIPers with businesses along the continuum of maturity. Continuing the pivot to independence, I graduated from DU, quit my job and changed my AIIP membership to associate. I was a business-owner-in-transition.

Finally, I launched my website and became a full member. I remember having endless questions and wondering how other people did it. Then I discovered the AIIP “First Year Questions” webinar series. Each webinar features two to three members with established businesses who answer whatever questions attendees have. Members tell us this webinar series is a valuable resource for them, offering the kinds of insights you won’t find in a book. Even as President of AIIP, I still attend the live webinars or watch the recorded First Year Questions videos, always learning something new from my peers.

We’ve got a wealth of webinar resources from our talented members, industry partners and popular external speakers. To help save time and find resources you may not realize AIIP has, we’re organizing webinar recordings into topical collections, starting with one for those getting started in business. Members can freely access all webinars; not-yet-members can buy subscriptions for individual recordings or for a webinar series.

AIIP is amping up our support for new infopreneurs in other ways. Membership Director Mary Ellen Bates runs bi-monthly virtual meetings for new members or those getting started in business, with programming and support specific to their needs. We record these meetings and include them in the resources for members. Other benefits tailored for information professionals include:

- **A Getting Started Guide.**
- **A supportive and collegial discussion list** where members ask and answer business questions a
- **peer mentoring program** for one-on-one coaching
- **Accountability buddies.**
- **An up-close and in-person conference** that focuses on building real relationships with others in the same boat as you

We offer these services because we know that all beginnings are hard. How many times have you said to yourself, “If I’d known this was going to be so hard, I never would have started it in the first place…but I’m so glad I did.”?

Whether an AIIP member or not, take advantage of our infopreneur community resources to help you grow your future by growing your business.

http://aiip.org/join

Jane Langeman
Ruby Sponsor:
Scott Attenborough
By Marilyn Harmacek

Ruby Sponsor Scott Attenborough admits that for several years he was an AIIP lurker. This LexisNexis manager found himself out of work at age 50 and joined AIIP in 2010 looking for his next career. Then he lurked on AIIP-L and sat back at AIIP conferences until he finally realized it pays to get involved.

“It was obvious that the best AIIP benefits seemed to be the people, and I knew if I didn’t get involved and get to know the people, I wasn’t going to stay.”

Volunteering success did follow Scott as he is currently AIIP’s President-Elect. Now involvement is his battle cry as he works to make volunteering easier. “I’m on the board to do more things to get members involved. It truly is the only way to reap the best benefits the organization has—its members.” One of his projects is creating a succession model so when current volunteer leaders step aside, there’s a trained member ready to step in.

For Scott, sponsorship is just another way to stay involved. He doesn’t give monetarily for the marketing value. He does it to support what he believes in, and does it in a give-it-and-forget-it way. “If you believe, you give. It’s that simple.”

In his eyes, when it comes to AIIP the benefits are incredible. “Where else can you learn new skills from the experts? All you have to do is get to know them.” Scott is currently working on a great project with another AIIP member “that I wouldn’t even have known about if I hadn’t been involved.”

“Everyone needs to give in some way to make the organization work. That’s how this model thrives.” That includes doing our part to bring in new members by being promoters and advocates for AIIP. “No one can join if they don’t know about us, and look what they’re missing.” If all each member did was bring in one member, our membership and capacity would grow. “We’d double our membership, and, truly, the best way to do it is by word of mouth.”

While Scott feels involvement is the holy grail for members, he sees waiting as the holy fail: Waiting for a project; waiting for a contract; waiting to be told what to do. “That’s just wrong. If you don’t have a project, create one!

Use the skills you want clients to see and post it on your website. SHOW them you can do it!”

And if you don’t have the skills? What better place than AIIP to practice with all the expertise to draw upon. “Everyone thinks they need to be a seller. In reality, they need to be a connector talking to people until they find a connection.” Then, you learn what people need and tell them you can do it. “You can always figure out how to get it done. AIIP is great for that.”

It’s those get-off-their-duff successful people that inspire Scott. “I’m always fascinated by what other people do. Think of it: They created something out of nothing. It may not be perfect, but they did it.”

And this past lurker’s life today? “I used to wake up waiting for the other shoe to drop. Now, I wake up every single day grateful that I’m an entrepreneur. I’m living the dream!”

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AIIP Volunteer Spotlight:

Becky Leung and Jennifer Pflaumer

by Scott Attenborough, AIIP President-Elect

Over the last year, it became clear AIIP’s video hosting service needed an upgrade. The host we currently use lacks the functionality and the flexibility needed to keep up with growing demand.

Jennifer Pflaumer and Becky Leung volunteered to take on an analysis of products and services we might use to upgrade our capabilities. They created a list of requirements, prioritized those functional requirements, and then began the hard work of analyzing the alternatives and providing fact-based recommendations.

Jennifer and Becky’s hard work resulted in the AIIP Board selecting Vimeo as its new video hosting platform.

Jennifer’s Web Team will be instrumental to setting up the new platform and migrating our current videos. We look forward to a smooth and professional migration with the help of Connie Clem, Karen Klein, and Deirdre Black.

We would like to thank Jennifer and Becky for stepping up to the plate and hitting it out of the park!

“As an information technologist, Jennifer lends her technical chops to AIIP as the Web Team lead. She gracefully juggles a chorus of requests from across the organization. Jennifer is a leader with strong shoulders.

Becky is a technical content expert who loves to take on important projects. For every new idea tossed her way, Becky says, 'Bring it on'. Her strong technical expertise was invaluable to the hosting platform discussion.

I’m grateful that Jennifer and Becky stepped up to help push AIIP’s digital presence forward.”

Jane Langeman, AIIP President

“I enjoyed working with Jennifer Pflaumer and the AIIP Web Team to evaluate potential audio/video hosting platforms to replace the existing platform. I learned about the current AIIP webinar uploading process. I look forward to working with the AIIP Web Team and Webinar team on the migration to the new Vimeo platform.”

Becky Leung - AIIP Web Team

“It was great to work with Becky on the project. Her tech knowledge and ability to assess systems against the requirements was exactly what we needed to make the best recommendation for the video platform. In the process I also learned a lot about what to look for when evaluating these types of systems, and most of all, the value of knowing what the requirements are – if you have the requirements locked in, it can help whittle down the potential systems quite efficiently.”

Jennifer Pflaumer - AIIP Web Team
Ellen Naylor and I are Co-Chairs of the AIIP Local Groups. We would like to encourage you to develop local or special groups to get together with your AIIP colleagues. If you and your colleagues can’t meet in person, a virtual AIIP meet-up is a great alternative.

My local group
I have been part of the Asia Pacific (APAC) local group that has been meeting via Skype since Heather Carine set up the first meeting in May 2012. Our group of about ten members really stretches the concept of local. Our members are based in Singapore, Australia, and New Zealand—a spread of some 5,000 miles and four time zones.

Taking the lead
If you would like to set up a new local or special virtual group, here are some first steps:
- Canvas to see if there is a need for it. Does it solve a problem?
- Consider whom to invite and what makes someone eligible to participate (geographic location, skill base, etc.)
- What would people like to achieve?
- What should the length of the meet-up be?
- Who will co-ordinate the first meet-up?
- What communication platform could you experiment with?
- Get going!

Online calling technology
The APAC AIIPers aim to Skype every three months. We use the audio dial-in function of Skype (and there are alternative platforms such as Google Hangouts).

Audio Skyping has an obvious disadvantage: you can’t pick up on body language cues and see who is talking. Also, it can be easy to cut people off mid-sentence due to the time-lag that often exists on Skype, which can be jarring to the flow of the conversation. However, using the video option can place a strain on some people’s Internet connection, or they may not all have cameras on their computer set-ups.

If you do choose to use the video option for your meet-up, make this expectation to your group clear so you can tidy your office if need be, and not be seen in your PJ’s!

Organizing an online meeting
When setting up a meeting, you will need to:
- Send a Skype invitation to the attendees, which they will need to accept.
- Give people at least a week to respond to your invitation before your Skype meet-up.
• If you haven’t received an acceptance, prompt again 48 hours before the meet-up. (It gets a bit stressful dealing with this five minutes before the Skype meet-up.)

**Planning your first meet-up:**

• The organizer emails an invitation with a selection of virtual meet-up dates and times.

• Communicate the confirmed date and time for each attendee, based on what their time zone is, plus a reminder about what topics you plan to discuss.

With our APAC AllPers meet-up, the organizer suggests some topics that we can discuss as a group, and invites others to submit ideas for discussion. These are communicated to the group ahead of the meet-up.

**Online meet-up facilitator**

Someone needs to be in charge of the meet-up on the meeting day. Facilitation activities include:

• Initiating the Skype dial-in process.

• Acting as the troubleshooter. For example, if the Skype connection is of poor quality, they announce that you are going to stop the session, and try again.

• Welcoming people to the meet-up.

• Making sure everyone has their fair share of talking time and listening time, and is able to assertively do that.

• Moving things forward in terms of content of the meet-up.

• Assigning any responsibilities towards the end of the call.

• Making sure that the meet-up finishes on time.

It’s a good idea for the facilitator to dial in five minutes early in case there are technology issues. Past experience has also taught us that it is handy to have access to one another’s email in case there are any issues from attendees such as last-minute unavailability.

In our APAC AIIP meet-up group, we usually ask each attendee to introduce themselves and describe how their business has been going in the past three months (success and challenges). This takes each person around five to ten minutes, and often sets off discussion amongst attendees about how they have had, or solved, similar issues in the past. We then move onto the main topic for discussion. Past topics have been AIIP surveys and reports from AIIP conference attendees.

**Ground rules**

Like any meeting and sharing of information, it’s always good to have some ground rules for attendees, too.

• Everyone should use the Skype test call function before attending the meet-up to make sure their Skype connections are configured correctly.

• Avoid doing any downloads while Skyping. Avoid having other software open that can slow down your computer.

• As in a face-to-face meeting, it is rude not to give someone who is speaking your full attention by being distracted with emails or trying to multi-task while they talk.

• Attendees should ensure that they are each located in a room that is quiet and without distractions.

**Conclusion**

We use the virtual meet-ups to develop professionally, nurture professional networks, and support each other with empathy and humour. In the APAC AIIP region, we have good insight into our members’ skills and expertise—and the range of resources that we can call upon. Despite distance, we have developed camaraderie, which can only be good for our professional development. It’s a real, value-added benefit of belonging to AIIP.

Cathy’s company, Heath Research Services, gives managers the information to make informed decisions that reduce anxiety about decision-making. This means that a market strategy will have a reduced risk profile, and allows decision makers to use the resources they have effectively.

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**What do we want?**

**MORE CLIENTS!**

**When do we want them?**

**NOW!**

If what you’re doing isn’t working, you need Mary Ellen Bates’ course,

**GETTING YOUR FIRST FIVE CLIENTS**

This 5-module online course covers everything you need to build the business you want in 2016!

Check out this and my other offerings at BatesInfo.com/courses
Social media is pretty much a fact of life for most businesses today. AIIP and its members need to keep up-to-date on how to best use different platforms for the best effect. Many members have expressed interest in learning how to use social media for business development.

In order to start a conversation concerning how social media can be used to help market your business, on November 4th the Social Media Marketing SIG presented a webinar on how to use LinkedIn to find suitable prospects for your business.

The webinar was presented by Scott Attenborough (Content Capital) and Andrea Carrero (Word Technologies). We discussed how to think about the type of people you want to connect with, and demonstrated detailed searches on LinkedIn. Then there was a period for questions and answers. In the end, a homework assignment was presented to keep the ball rolling.

Hands-on work will be the best way for us all to discover how to best use social media in our businesses. We also hope to produce several handouts and templates to help members with their research.

We look forward to follow-up sessions to discuss topics such as:
- How to contact and connect on LinkedIn
- Building a client persona/audience profile
- Maintaining and nurturing relationships
- Publishing articles on LinkedIn

The webinar will be available in the members-only section of the AIIP website.

We hope interest will continue and AIIP Members will benefit from these webinars and the Social Media Marketing SIG.

I would like to thank Andrea Carrero, Deidre Black (American Blackshoe) and Matthew McDaniel (P&N) for making this webinar a reality.

Scott Attenborough, owner of Content Capital Services, provides content development and metadata services to online publishers and aggregators. He is AIIP President-Elect and Chairman of Veterans 360 and Carry the Challenge where he helps returning combat veterans transition to civilian life.
AIIP Peer Review is YOUR space to share your experiences with tools, resources, courses, or conferences that you believe might be of interest and of benefit to your AIIP colleagues. If you’ve recently tried a new tool or resource or you are a long-term fan of product or resource that helps you grow your business on a daily basis please contribute to the column. Reviews can be 500 to 1000 words long and should reflect your own experiences. Why was the tool valuable to your business and how did using it help you achieve your own business goals? AIIP Peer Review is not intended to promote or rate one resource over any other. Reviews are for information purposes only. If you have ideas for future AIIP Peer Reviews, contact Denise Carter at denise.carter@dcisionconsult.com.

When I started my business last year, I knew I needed systems for lead tracking, client management, time tracking, project management, and bookkeeping, but I was overwhelmed and confused by everything out there and the idea of managing them all. So, after some research on what would give me the most bang for my buck, I settled on 17hats, a complete CRM system for small businesses. 17hats is a cloud-based system that offers all of the above functionality in one place. With the system, you can track leads either manually or via a lead capture form on Facebook, on a website, or with an email link. You can manually add contacts to the system and classify them as clients, hot leads, cold leads, or other contacts. Once you’ve put your contacts into the system, you can create projects for them. Within a project, you have the ability to add notes, emails (synced automatically through your settings), files, tasks, events, phone calls, time, and activity, in addition to important documents such as quotes, contracts, invoices, and questionnaires. Your important documents can be accepted and signed electronically, and invoices can be linked to Paypal, Stripe, or Square for electronic payments. Additionally, you can sync your bank accounts to the system to make bookkeeping a breeze. A great bonus feature is the ability to create workflows to automate your projects and save you time.

Cost

17hats recently revamped its cost structure from annual subscriptions to monthly ones. Subscriptions are available for three tiers, as follows:

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<th></th>
<th>Basic</th>
<th>Lite</th>
<th>Unlimited</th>
</tr>
</thead>
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<tr>
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<td>$17/mo.</td>
<td>$39/mo.</td>
</tr>
<tr>
<td>Projects</td>
<td>3 active projects</td>
<td>up to 15 active projects</td>
<td>unlimited projects</td>
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<td>Mobile App</td>
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<td>Bank Account Syncing</td>
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<td>Transaction Processing</td>
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<td>Trial Period Support Only</td>
<td>full customer support</td>
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My Opinion?

I really like the all-in-one functionality of the system, which helps keep the number of systems I use to a minimum. The email integration, templates, contracts, time log, and invoicing are some of my favorite features.

17hats is continuously upgrading its system based on user feedback. I dislike that emails do not sync when projects haven’t been opened for the contact or lead. And, although you can add related contacts to projects, you can’t create projects and then add contacts to them like with other systems.

The following is a selection of other popular CRM management tools plus some tools that offer specific features found in 17hats:

**Insightly**  **Zoho**  **Hubspot**

**Document Signing:**

**Hellosign**  **Docusign**

**Accounting:**

**Freshbooks**  **Quickbooks**  **Wave**

**Time Tracking and Project Management**

**Toggl**  **Asana**  **Trello**

Jennifer Brown Wegman, MBA, is the owner of Insight Information Solutions, LLC, a research support and consulting firm based in Pennsylvania that offers research, data analysis, and consulting to drive business development for service-based businesses. You can reach Jennifer at jennifer@insightinformationsolutions.com.
Courtesy of AIIP, I attended day one of the conference and sat in on sessions covering all three tracks for that particular day—the learning librarian, new technology, and engagement with communities. The overriding message I took away from the presentations was: in this digital age, more than ever before, librarians and information professionals need to be proactive and several steps ahead of the game to remain relevant to their communities.

Terence Huwe of the University of California presented on how artificial intelligence (AI) and deep learning—defined as a form of machine learning based on neural networks—will affect our daily lives. Huwe made reference to Artificial Intelligence and Life in 2030, a Stanford University report, on what impact AI will have on our lives by 2030. The fundamental question was: should we be concerned about superintelligence, when machines could conceivably surpass human intelligence? It will be key to have regulators who hold policymakers to account and to have qualified information professionals capable of handling big data and acting as authoritative gatekeepers. Chief Analytics Officer is likely to become a new job title. Already Microsoft is reorganising its company around AI.

Huwe made reference to Artificial Intelligence and Life in 2030, a Stanford University report, on what impact AI will have on our lives by 2030. The fundamental question was: should we be concerned about superintelligence, when machines could conceivably surpass human intelligence? It will be key to have regulators who hold policymakers to account and to have qualified information professionals capable of handling big data and acting as authoritative gatekeepers. Chief Analytics Officer is likely to become a new job title. Already Microsoft is reorganising its company around AI.

Mia Ridge, the digital curator at the British Library, spoke about the BL Labs project, launched in 2013 to engage researchers with the library’s digital collection, which incredibly still only contains about 2% of the BL’s vast archives. She also emphasised the need for librarians to keep up-to-date with technological advances. To that end, she has introduced monthly in-house workshops for her staff, where news and ideas on strategy and tools are exchanged.

Suzanne Wheatley of recruitment agency TFPL moderated an interesting session on different roles for librarians within an organisation. We become involved in so many tasks related to our jobs, any one of which could easily turn into our main area of activity. For example, a large refurbishment of the library at Maynooth University, Ireland, led to librarian Eileen Bean taking on the role of an events manager. The new, modern space became so popular with academics, students, and local business people that she found she was spending increasingly more time booking rooms and organising events. Kenn Bicknell of the Los Angeles County Metropolitan Transportation Authority has used journalism skills to turn the Authority’s website into a first port of call for all matters current and historic relating to transport.

Finally, a story from Denmark to warm the cockles of your heart: Kirsten Sydendal, a knowledge manager based on the island of Lolland-Falster used her organisational and social media skills to help improve the image and ultimately the economy of the island. For many years the island had been suffering from a poor reputation, and a negative documentary broadcast on national television was the final straw. Sydendal, with some friends, set up a Facebook page to post positive and encouraging stories and created a logo to improve the island’s brand image. Within a year they had become a national success story. Now, the island is visited by more tourists, the population has grown, house prices have increased, and best of all, the government has listened and has promised funding for much needed infrastructure. An encouraging example of what communities can achieve with collaboration.

Penny Crossland is the owner of CH Business Research Ltd, a consultancy specialising in investigative research. Penny conducts pre-transactional research, employment screening, due diligence, asset-tracing and KYC projects for clients from the financial services and corporate intelligence sectors. In addition to being a long-standing member of AIIP, she is also a member of LIKE, the London Information Knowledge Exchange and OSIRA, the Open Source Intelligence & Research Association.
It’s good for business

By Ruth E. Thaler-Carter, 2017 AIIP Conference Committee Member

“Don’t even think about not going!”

That’s what regular attendees (and many recent, first-time attendees) say when the topic of the annual spring AIIP conference comes up. With so many compelling reasons to join fellow AIIPers for learning, networking, and building your business, here’s our perspective on key opportunities the 2017 conference offers both you and your company.

Conquer isolation.

• Going to the conference is a great way to counteract the loneliness many feel when they are working away in their home offices.
• It is an energizing break from routine and a fantastic opportunity to feel connected to a larger community of colleagues.
• Putting faces to those e-mail addresses is a bonus.

Go on a mini-vacation while you boost your business.

• The 2017 AIIP conference in New Orleans provides an exciting location with a lot to offer to attendees and their families.
• Give yourself a much-needed “shot in the arm”—and benefit financially by writing off at least some of the related expenses.

Romance may bloom—seriously!

• We know of at least two marriages that resulted from colleagues meeting at conferences.

Find out why one AIIP colleague’s mantra is:

“If you ever question whether you can afford to go to the AIIP conference, let me tell you: You can’t afford not to!”

Join us in New Orleans in May! We look forward to seeing you there.

New Orleans is strong and welcoming, and you will feel the vibe instantly. It’s not just a great place to visit for the conference, it’s also a great place for spouses, kids and other family members to have a blast while AIIP members are busily learning and networking at the conference.

Make your own Mardi Gras!
Take in the sights and scenes of this historic cultural center. Highlights include:
- The bustling riverfront with its picturesque paddle steamboats and horse-drawn carriages offering a glimpse of the past.
- The lively French Quarter: Home to Bourbon Street; Preservation Hall; a wealth of jazz; classic architecture; shopping; galleries—and even a haunted house.
- Jackson Square, a lovely park where artists paint, draw, and sell their work.
- The Audubon Zoo, an urban treasure.
- The Aquarium of the Americas, celebrating Gulf marine life, penguins, and parakeets.
- The National World War II Museum, featuring military exhibits, planes, and a stirring 4-D theater.
- The Lush Garden District.
- St. Louis Cathedral, the oldest U.S. cathedral in continuous use, with two noted state museums nearby (the Presbytère and Cabildo).
- New Orleans City Park: Home to the New Orleans Botanical Garden; the New Orleans Museum of Art and Sculpture Garden; Carousel Gardens Amusement Park; Storyland; City Splash water park; tennis courts; an 18-hole golf course; and one of the world’s largest stands of mature live oak trees (one is almost 800 years old).
- Mardi Gras World: Working studios that make the fixings for this wild and crazy event—with sculptured props, huge floats, wild costumes, and a variety of figures on display.

Getting around
- Transit by trolley car adds to the ambiance of the city.

Culinary adventures
You can’t come to town without sampling beignets at least once. Tantalize your tastebuds with Cajun-inspired seafood and more.

Music beats at the heart of the city
The NOLA Convention and Visitor Bureau recommends these live entertainment venues:
- The Maple Leaf Bar
- The Howlin’ Wolf
- Republic NOLA
- Snug Harbor Jazz Bistro
- d.b.a.
And one conference committee member always makes a beeline to Tipitina’s when in town.

For Sunday jazz brunch try:
- The Maple Leaf Bar
- Brennan’s New Orleans claims to have invented Bananas Foster.
- Arnaud’s has a Mardi Gras museum in the restaurant.
- Atchafalaya Restaurant made Huffington Post’s Ten Best Urban Brunch locations

More about touring
The NOLA Convention and Visitor Bureau Directory of Tours provides many choices of neighborhood touring for all to enjoy, including:
- the Warehouse/Arts District
- the French Quarter
- the Riverfront

One source for wide-ranging tours is a Hop-on Hop-off Tour: An open-top, double-decker sightseeing bus offering stops at 18 locations around the city. You can get off wherever you like or stay on board for the full two-hour loop. A guided walking tour of the Garden District is part of the service. You also can tour the bayou or try an airboat ride.

To learn more about these and other touring opportunities for you and your family, request your copy of the New Orleans Convention & Visitors Bureau’s Visitor’s Guide before you set sail for the conference. Copies will also be available at the hotel when you arrive.

For the latest AIIP sightseeing information
AIIP member Debbie Wynot is working with a local tour guide to develop more recommendations for tour activities. Keep an eye on the AIIP 2017 conference page for news!

Another Bite at the Apple
Going Back to School as an Independent Info Pro

by Dan Odenwald, Capstone Information Services & Consulting

Like most information professionals and self-professed lifelong learners, I’ve always loved school — even when I hated it (#7th grade). I loved the post-Labor Day rituals of packing up the beach towels, pulling out the books and getting back to my studies.

It all ended in 1998 when I finished my master’s program in journalism and leapt into the workforce. Only the memories remained.

This past May, after 18 years of bittersweet nostalgia, I decided to go back. I enrolled in the MSLIS program at Catholic University in Washington, DC, for a 30-credit, 10-class run. I’ll graduate in 2018.

So why go back?
It’s a question I heard over and over again from friends and family. Is it really worth it? Did I really need another degree? How would it help me in my career? How would I pay for it? How would I balance work, school and a life? Was I crazy?

All good questions. So I set out to answer them, not only for myself, but for the countless other midcareer professionals considering more schooling. My research focused on librarianship and the info pro industry, but the findings may be instructive for other disciplines and industries as well.

In my conversations and readings, I found a mix of motivations, interests, rationales, hopes and fears. Mostly, I learned that — if you’re contemplating going back — it pays to do your homework first.

Is It Worth It?
“For people in the information-seeking industry, learning is something we do naturally,” says Valeria L. Hunter, Principal Consultant, Hunter Knowledge and Insights. “You may as well do it in a way that helps add to what you can offer your customers.”

Hunter, who worked for corporations for more than 30 years before turning independent info pro, obtained her MLIS from Dominican University in Illinois last year. It’s her second graduate degree; she earned an MBA in 1990.
She specializes in knowledge management and enrolled in the MLIS program to formalize her learning around the subject, knowing it would become a focus in her work as an independent.

Like Hunter, most info pros see value in learning for learning’s sake. Yet when it comes to formal education and — more specifically — its obligatory investment of time and money, info pros also stressed the practical, career-enhancing benefits of academic credentials.

Ruth E. Thaler-Carter, a freelance writer and editor based in Rochester, NY, observes: “No learning is useless, but some is more than valuable than others. Getting an advanced degree can’t hurt, but it might not be necessary. It can depend on the kind of clients an independent information professional wants to work with.”

In his article, “Is A Master’s Degree or Grad School Really Needed to Achieve Success?”, author Pejman Ghadimi writes, “Many people come to me often asking if they should go back to school, and I ask why they think going back to school will help them get closer to their goals.”

He adds: “Obtaining a master’s degree is not necessary to become successful, but that doesn’t mean the degree is useless. It is only useful if there is a need for the degree where you are employed.”

Certain professions, like medicine or law, require degrees, Ghadimi writes. But “the information learned from an MBA program or master’s program could be found online completely free, so the education value of going to school to learn business is obsolete in many ways.”

Some evidence suggests an advanced library degree may not necessarily boost a graduate’s job prospects, according to LibraryJobline, a library jobs site published by the Colorado State Library.

It found the percentage of employers posting to the site, who required an MLIS degree, dropped from 31% in 2009 to 20% in 2015. Meanwhile, the percentage of employers, who simply preferred an MLIS, dipped slightly from 18% to 16% over the same period.

Additionally, a degree may do little for the new grad’s wallet. LibraryJobline found that the average starting wages for positions requiring an MLIS rose just 1% from 2009 to 2015.

Yet salaries for positions simply preferring an MLIS and those with no preference at all rose 14% and 16%, respectively, over the same time period.

“You don’t need to get a graduate degree in information science,” writes Mary Ellen Bates in her primer for independent info pros, Building & Running a Successful Research Business. “But consider taking some continuing education courses in information organization, reference skills, and online research … A number of successful independent info pros almost stumbled into the profession from another field, after deciding that what they really enjoy is finding information…”

Michael H. Gelman, Principal, Gelman2 Information Services, believes an MLIS can convey a “gold seal” to potential clients and “represent a license to practice.” Like many of his independent colleagues, Gelman sees an additional academic credential as a potential business asset — especially if it sets your services apart.

Currently enrolled in a PhD program at Iowa State University, Gelman is studying in the Apparel, Merchandising and Design program. He’s exploring library and information science concepts, such as big data, competitive intelligence and taxonomies, as they relate to the fashion industry.

Gelman intends to establish himself as a subject matter expert in the field and leverage his knowledge to attract business from the textile industry. “The library market has always been very, very tight, and info pros constantly need to work on acquiring new skill sets,” he says. “I want to be able to take these skills and put them into my business.”

Of course, the American Library Association (ALA) recommends aspiring librarians attend an ALA-accredited program: It “provides greater flexibility in the types of libraries and jobs you can apply for and enhances your career mobility. Most employers require an ALA-accredited master’s for most professional level positions.”

For Hadar Arditi-Babchuk, a new independent info pro pursuing her library degree in Israel, formal instruction provides an opportunity to learn the “language of the field.” She spent most of her career in primary research, first at the health ministry, then at the Israel Democracy Institute.

Her library training enabled her to work “across fields,” Arditi-Babchuk says. “I also got to know the databases and
resources info pros work with. [Many courses] were taught by people who work as info pros or librarians themselves so they were quite practical.”

While formal credentials are not a prerequisite to life as an independent, it can help with prospects unfamiliar with your brand. “They can make a big difference,” Hunter says. “Sometimes it might be the first thing you wave at people — especially people who don’t know you.”

**Paying the Piper**

A key consideration is cost. The price tag for an average graduate program can run the gamut: from $30,000 for an MLIS to more than $100,000 for an MBA. Ask any student: Choosing to go to grad school and paying for it are two distinct enterprises.

Cost can vary greatly from one university to the next, the ALA says. Factors to consider are: out-of-state tuition, credits required, housing, living expenses, books, fees, commuting and parking.

However, payment options abound for the midcareer professional: Some with the available cash can simply pay outright. Others may take out student loans or borrow against their homes. Students working for employers with tuition reimbursement can benefit from those subsidies, and some win academic scholarships.

Abigail E. Ross, an independent info pro based in Washington, DC, sees no real disadvantage in returning to school as a midcareer professional. “There are so many affordable options these days for an MS LIS program,” she says. “You can find one that you can afford and attend in person or online.”

Ross has a unique view on this question: Not only is she a principal at RoFinCo, where she leads the Research Services Division, she also teaches in Catholic University’s MS LIS program.

A degree “helps in all aspects of librarianship because it shows — like any other master’s degree — that you have the education to perform certain job tasks and functions,” she says. “Someone with the MS LIS has completed the coursework so the employer/client knows they should be able to perform those tasks.”

Phyllis Smith, Partner, ITK Vector in Canada, is pursuing a second master’s degree in Professional Communication. “I do think it is important to do a cost-benefit analysis. Most programs are expensive and can take up a lot of time,” she says. “There are no guarantees that you will recoup the financial costs quickly, or at all.” She adds, “If you’re looking at grad or post-grad programs, consider how valuable that credential will be and/or how badly you want the academic challenge. You have to want it for your own personal reasons regardless of whether you’re able to turn it into profits.”

Some independents choose a less costly route. Roger Magnus of Roger Magnus Research in Massachusetts is taking a break from his business to develop skills in data analysis.

Rather than pursue a formal institutional degree, he’s opting to teach himself software programs such as Tableau, Open Refine and R. With the assistance of free online tutorials and some one-off coursework at a local university, Magnus is self-pacing without turning over thousands of dollars to the academy.
Even less formal opportunities for learning are available to info pros. “Don’t overlook the free webinars or lunch meetings offered by vendors in the library and information world. Although these webinars are generally meant to acquire new customers, some also offer webinars or sponsor in-person meetings to discuss some of the hottest issues in our profession,” authors Deborah Hunt and David Grossman write in *The Librarian's Skillbook: 51 Essential Career Skills for Information Professionals.* “Additionally, a vendor-sponsored gathering is also a potential networking opportunity.”

Indeed, Smith recommends considering more than degree programs to further one’s education. “I’m also working through an editing certificate program. I was able to pick up courses as I felt I was able to handle them before I even applied to be accepted into the program,” she says. “It’s not a degree and won’t give me a credential to tack onto my name, but what I’ve learned is fantastic.”

Still, most traditional library jobs (read: not independents) require formal graduate schooling, according to the *Occupational Outlook Handbook* published by the U.S. Bureau of Labor Statistics.

“A degree from an ALA-accredited program may lead to better job opportunities,” the handbook says, and pegs 2015 median pay for a librarian with a master’s degree at $56,880 per year.

Broadly, 65% of all jobs will require some form of post-secondary education or training by 2020, according to a 2013 report from the Georgetown University Center on Education and the Workforce. That’s 6 percentage points higher than 2010 and 9 percentage points higher than in the 1990s.

True enough, some say, but formal education struggles in transmitting the soft skills necessary for success as an independent. “Academic programs, with good reason, cannot cover in depth the vast array of challenges awaiting graduates in the workplace, much less the situations unique to consulting,” writes Ulla de Stricker in *Is Consulting for You? A Primer for Information Professionals.* “Consultants often comment that such difficult-to-nail-down skills as being able to think on their feet, being good at facilitating teamwork, interpreting interpersonal dynamics quickly, and formulating complex subject matter clearly and concisely have been critical success factors for them.”

### Balancing It All

For midcareer students taking the plunge, advancements in online education have made balancing a full-time job and coursework more manageable.

For example, Smith’s Professional Communications program—at Royal Roads University in British Columbia—is mostly online with two short residency periods. She lives clear across the country in Toronto.

“The upside is that I can work on the degree and still continue with the rest of my life — family, business, etc. — without a huge disruption. I can customize my schedule to suit myself,” Smith says. “The downside is that a full degree is a real commitment. It’s not like a weekend seminar, and you’re done. It can be very stressful, and it can interfere with other things I might like to do.”

“The cool thing nowadays is that we can take MA-level classes remotely at any time and build up credits toward an advanced degree at our leisure,” Thaler-Carter says. “You can do a lot of the work without having to go to campus every day.”

Gelman recommends keeping a flexible schedule so independents may serve both their clients and their studies. Also, be prepared to work evenings, weekends and to sacrifice a lot.

“Vacations are tough, and leisure time is scant,” he says. “Your time management skills have to be top-notch, and you basically have to be determined and make up your mind that you really want it.”

If you choose to go, Ross recommends investing as much as you can into the experience. “Learn from your fellow students and take advantage of all your institution offers,” she says. “Don’t be shy about contacting librarians you want to know or emulate. We are a very welcoming crowd, and most of us are happy to help students.”

Dan Odenwald is founder and principal research consultant at Capstone Information Services & Consulting in Washington, D.C. He joined AILP in September. Contact him at dan.odenwald@capstoneinformation.com.
Collaborating for Success: 
Tips for Effective Teamwork

by Karen Klein, Fulcrum Information Resources, with Michelle Rawl, Rawl Research, Inc.

Michelle Rawl and Karen Klein recently completed a 10-month project for the Legal Services Corporation (LSC), a Washington D.C.-based independent nonprofit established by Congress in 1974 to provide financial support for civil legal aid to low-income Americans. Karen and Michelle credit AIIP with being the catalyst for their collaboration and for bringing LSC’s request for proposal (RFP) to their attention.

Michelle and I met several years ago at AIIP’s annual conference and just clicked. We have many shared experiences including children in the same age range, family in southeastern Pennsylvania, and similar personalities. After swapping stories and hobnobbing at subsequent conferences, Michelle contacted me to help her with writing, proofreading, and editing her company’s web content. She also invited me to work on some ad hoc AIIP board projects during her tenure as AIIP’s director of membership, and I did some subcontracting work for her that focused on her area of expertise—tracking media coverage of products and services for public relations firms. These projects helped us to learn about each other’s working styles and communication preferences, as well as cementing a high degree of trust. Plus, we had fun!

In October 2015, Michelle contacted me regarding an e-blast we received from AIIP with an RFP from LSC. In her words, “You should look at this and we should go for it! I think you should be the project lead.” And my response was, “No, no, no, no, no.”

Why all the “nos”? The RFP was daunting and written in government-speak. I was leaving on vacation. I couldn’t imagine pulling a proposal together in the short timeframe that the RFP specified. But after looking at it a second, third, and fourth time, and with some prod-ding from Michelle, I began to see how we could manage the assignment and the roles each of us would take.

The project had several components, all designed to help LSC implement a grant it received from the Andrew W. Mellon Foundation to “develop a framework for creating an online curriculum that would teach public librarians how to assist their patrons to access publicly available civil legal information.”

- Research and catalog existing civil legal aid and self-help resources for the general public and for public librarians for each of the 50 states and United States territories.
- Write a white paper on the civil legal self-help resources that were discovered.
- Facilitate the convening of an advisory group comprised of well-placed stakeholders attending a one-day meeting to get their input and feedback on the project.
- Develop a curriculum framework for training public librarians on helping patrons to access publicly available civil legal information.
- Prepare the grant close-out reports for the Mellon Foundation.

In addition, the RFP stated that the “library facilitator(s)” would serve as the project manager, developing the timeline and keeping the assignment on track. For this component of the assignment, we decided that I would be the project manager, aka the “enforcer,” communicating with the client and handling the project management side, and Michelle would be the cheerleader,
encouraging me in my enforcer role, for the project. Michelle would take the role of documentarian for all the meetings held with LSC.

Before we responded to the RFP, we estimated how much time we expected each of the tasks to take. Since it was a fixed-price contract, we wanted to make sure that we could successfully complete the project’s requirements within the time and budget outlined in the RFP. We also agreed that we would split the workload and the fee.

We spent a good deal of time writing and refining the proposal until we deemed it ready for primetime. The working pattern that we established during the proposal-writing phase continued throughout the project. I wrote the first draft, and then Michelle proofread and provided input.

LSC notified us that we were finalists and they wanted to interview us using GoToMeeting. At that point, we enlisted the help of Jane Langeman, now AIIP Board President, to conduct a dress rehearsal so we could test our respective computers, lighting, and familiarity with the GoToMeeting software. This rehearsal was a crucial step, ensuring that we were well-prepared and confident for the interview. Michelle and I held several run-throughs playing the part of interviewer and interviewee. Just like any staged, filmed event, there was chaos and clutter just outside the webcam’s view, but our respective offices looked polished and professional (and we’d like to think we did too) for the interview.

After we were awarded the project, we spent a great deal of time carefully reviewing the contract and ensuring that we were clear on the expectations, deliverables, and milestone dates. In addition, we reviewed the government travel and expense guidelines that had to be strictly followed for reimbursement. After three modifications, we signed on the dotted line and were ready to get started.

The day after signing the contract, LSC requested that Michelle and I attend an in-person kick-off meeting the following week. We scrambled to rearrange our schedules so we could accommodate LSC’s request. Since Michelle lives in eastern New York and I live in eastern Pennsylvania, we decided to drive to the meeting in Washington, D.C. Michelle and I met in York, Pennsylvania for breakfast, and then headed for DC. It was an exhausting drive and I was just the passenger! Even though we thought we gave ourselves ample time to arrive for the 1:00 p.m. meeting, heavy traffic, construction, and an accident forced us to skid into LSC’s office at 1:00 p.m. on the dot. Following the 90-minute meeting, we turned around and endured another excruciating drive back to Pennsylvania.

As project manager, one of the first things I did was create a Gantt chart to track the deliverables, tasks, deadlines, and responsible parties for the entire project. The second thing I created was a spreadsheet for Michelle and I to track

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our respective hours for the major tasks of the assignment: research, writing, project management, meeting, and administration. We logged our time daily and could see at a glance where we stood compared to the time we expected each task to take. We used Dropbox for all project-related documents.

I initiated weekly written updates with LSC, but that turned out to be communication overload for them. We started biweekly update meetings and that turned out to be a good way to keep LSC informed of our progress. Both of us had to adapt to working with a government agency rather than the corporate clients we are used to dealing with. After we learned more about LSC’s communication preferences, the project ran extremely well and LSC called us “rock stars” more than once throughout the assignment.

**Tips for a successful collaboration:**

- **Track your time**
  Although we were spot-on for the amount of time we estimated for our formal meetings with LSC, we underestimated the time that Michelle and I would spend communicating with each other. For future projects, we would build in more for collaboration time. By tracking our hours, we could see at a glance what each of us had contributed, which allowed us to tweak the workload as needed to maintain the 50/50 partnership.

- **Be flexible**
  Although the signed contract with LSC felt iron-clad, LSC made some adjustments to the scope along the way and we accommodated that.

- **Stay the course**
  There were times during the project when LSC wasn’t responding to our messages or attending the scheduled update meetings. Regardless of the client’s workload and schedule, we met each one of the agreed upon milestone dates and deliverables.

- **Treat your business partner with the same respect and professionalism that you treat your client**
  Each of us kept our word and met the internal deadlines we set for ourselves in order to meet the project deadlines. Since Michelle starts her work day a few hours after me, I would have documents ready for her to review and then she would return them to me for the start of the next business day. We also took care when proofreading or critiquing each other’s work to maintain professionalism.
Call for AIIP Awards Nominations

Now is your opportunity to nominate deserving AIIP colleagues who meet the requirements for three prestigious association recognitions.

Winners will be announced at the 2017 AIIP Annual Conference in New Orleans, LA, May 18 – 21, 2017.

Myra T Grenier Award
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A $600 Stipend is awarded to a new or aspiring independent information professional to support his or her first attendance at an AIIP Annual Conference. Note: You can nominate yourself if you qualify.

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A free AIIP Conference registration plus $1,000 is awarded to this lucky winner, who has been an AIIP member for at least two years, in business for at least three years, and has not previously attended an AIIP Annual Conference. Note: You can nominate yourself if you qualify.

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A $500 stipend is awarded to this Full member of AIIP who has significantly helped another member through formal or informal mentoring.

The deadline for nominations is the end of business on Friday, March 3, 2017.

Send your nominations or questions to Ellen Naylor, Awards Committee Chair, at awards@aiip.org

• Prepare for success

Neither Michelle nor I are “just wing it” types and it paid off. We spent a great deal of time preparing and rehearsing for each of the key in-person meetings. This included checking in with the client regarding their audio-visual equipment, room set-up, and meeting participants. We tried to take as much risk out of the equation as possible and it paid off with flawless execution.

• Ask the client for what you need

After that exhausting one-day drive for the kick-off meeting, we requested and received permission from LSC to travel by train and include an overnight stay for subsequent meetings. The train ride gave us additional time to rehearse (see above) and we were well rested.

Partnering on projects is a great way to secure an assignment that you may not have all the skills or time to complete. Collaborating on this project allowed us to bounce ideas off each other on the different facets of the assignment. It also gave us the flexibility to step in and cover for each other when other professional or personal obligations loomed.

Michelle and I are currently scanning the web to find our next big project.

Karen Klein, principal of Fulcrum Information Resources, provides business research, technical writing and project management services to corporations and consultants across multiple industries including advanced manufacturing, pharmaceutical, and non-profit. Contact Karen at kklein@fulcrum-info.com.

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