The Future of Special Libraries: The SLA Leadership Perspective

The EOS International Summit
March 30, 2007
Carlsbad CA USA

Specialized Libraries and Vendors in Transition:
A Dialogue about How Vendors and Information Professionals Can Shape the Future of the Industry

“Imagining the Future”

Summary

The library and information science profession is undergoing radical change, and special libraries are particularly affected. As research methodologies change and information-knowledge-strategic learning-seeking behavior changes as well, products and services for future service delivery must be anticipated. To meet future needs, new approaches to the relationship between technology and knowledge will be developed, particularly with respect to the connection between technology and knowledge as it is developed and shared in the workplace. How those developments will address the expectations of information professionals, vendors to the LIS community, and the clients of both groups is a topic of particular interest to leadership at both the Special Libraries Association and at EOS International. The two groups met in Carlsbad, CA on March 30, 2007 to discuss the subject.

Both groups expect special library managers to take a larger leadership role in the parent organization, particularly as users become more self-sufficient and demand higher-level services. There will be opportunities for vendors and special library managers to collaborate in shaping the future of special librarianship but both industries will be required to step back and evaluate carefully what they can bring to the library’s parent organization through such collaborations. The relationship between technology and knowledge is still being developed, but both groups are optimistic that by working together they can build a strong future for themselves and their clients.

“Imagining the Future.”

The phrase, often attributed to Drucker, is the first step in the three-stage planning process, and one often invoked by leaders thinking about just how good things can be. To reach their goals, managers and planners must

- imagine the future
- assess current services
- focus on results

While not specifically stated as such, imagining the future was definitely the driver for the EOS International Summit in Carlsbad, CA on March 30, 2007, when EOS International hosted eight leaders of the Special Libraries Association (SLA) for an in-depth discussion. The goal of the day was to think with them about what they – information professionals and vendors both – anticipate for the future. As it turned out, the conversation naturally took the participants through the other steps of the planning process as well, since in addition to imagining the future, leaders must come back to reality by assessing the current
It was a heady assignment, and all of the participants took to it enthusiastically. From SLA management, participants included CEO Janice Lachance and President Rebecca Vargha, Library Director, School of Information and Library Science (SILS), University of North Carolina. Other SLA leaders who participated were Kevin Manion, Director, Information Services and Strategic Planning at Consumer Reports in Yonkers, NY and who serves as president of SLA’s New York Chapter; Georgia Scura, Manager of the Bayer Pharmaceuticals Information Center in West Haven, CT and past-president of SLA’s Connecticut Valley Chapter; Karen Reczek, Manager of the Information Resources Center for CPS Bureau Veritas in Buffalo, NY and founder and chair of SLA’s new Knowledge Management Division (and founder and chair of SLA’s Competitive Intelligence Division); David Cappoli from the Graduate School of Education and Information Studies (GSE&IS) at the University of California at Los Angeles and president-elect of SLA’s Southern California; Linda Counts, Librarian at Sharp Grossmont Hospital Library in San Diego and president of SLA’s San Diego Chapter. The author, who works with EOS International as a special consultant for knowledge services and is a former president of SLA, was the summit’s moderator.

Management from EOS International participating in the summit included Tony Saadat, Chief Executive Officer; Sal Provenza, Vice President of Global Sales, Marketing, and Training; Jeff Goodwin, Director of Research and Development; Russ Tarvin, Development Manager; and Elizabeth Kelley, Marketing Manager.

Welcome and introduction

The summit began with greetings and welcoming remarks from Saadat and Provenza, and the group discussed summit objectives, which were to:

- share points of view about the future of special libraries and information centers
- discuss how vendors and managers of special libraries can work together to shape the future of special libraries
- discuss how vendors can join SLA and serve special librarianship as members, in addition to their role as vendors

As the first company to focus on developing and delivering products specifically designed for special libraries, EOS International management has taken and continues to take a particular interest in ensuring that special libraries and their managers are able to support their parent organizations with the highest standards of performance excellence.

In his welcoming remarks, Saadat commented that he had not missed an SLA annual conference since 1985 and that as CEO for a company whose primary client focus has always been on special libraries, he is committed to the industry. Management and staff at EOS International are strongly interested in identifying the concerns and goals of special librarians, in order to further understand the industry and attempt to respond to leaders’ expectations for the future.

Participant introductions

As they introduced themselves, the invited participants noted their own “special” connections with special librarianship. Lachance, describing her work as SLA’s CEO, noted that her role is to promote the industry, increase membership in SLA, and support the association’s three goals of learning, networking, and advocacy. She pointed out that her particular emphasis is unlike that of other participants, who as managers of special libraries are expected to ensure that special library services and products support the mission of the parent organization. Lachance stated that her commitment to SLA and, indeed, the role of the organization is to support the members, the working information professionals whose particular talents, skills, and competencies enable them to manage their special libraries.

Vargas, SLA’s President, commented that her work at UNC SILS also emphasizes working with the individual information professional, but at the beginning the person’s professional career, when they are students in the graduate library and information science (LIS) field. In Vargas’s case, the work covers all types of LIS careers, including librarianship in general (public, academic, school, and special librarianship), information technology, KM/knowledge services, content management, and the wide variety of other subjects and areas of expertise that now make up the LIS learning community. Working within this larger overview of the profession, Vargas noted that the graduate program does not focus on the library as a physical space, but instead advocates for the role of the professional in the community or organization and the position and status of the information professional in that role.
Cappoli, too, is in the LIS field, and his organization’s goal is to prepare graduate students to understand and improve educational practice, information policy, and information systems in a diverse society. At GSE&IS students are prepared for three degrees: M.L.I.S., Ph.D., and Moving Image Archivist.

Manion described in his work with Consumer Reports (like SLA a membership organization) by pointing out that his leadership of 20 staff members conducting research in the field of consumer advocacy focuses on products, safety issues, consumer sales, editorial oversight, and related topics. Reczik is also in a product evaluation field, but at Bureau Veritas the emphasis is on assessing consumer products for companies developing the products, not from the consumer side of the production cycle.

Scura talked about the special library situation at Bayer Pharmaceuticals, where the emphasis is on early-stage research and on post-development marketing. Currently, her company, like many in the pharmaceutical industry, is undergoing a merger and as a result, the Bayer West Haven site will be closed. She commented that many pharmaceutical companies have eliminated their Information Centers or have gone completely virtual as part of overall re-structuring plans.

Counts, in a related field (hospital librarianship), also commented about changes already being made in that field, since the accreditation of hospitals no longer requires that an accredited hospital have an in-house hospital library, but only access to a library. At Sharp Grossmont, Counts manages a one-person (solo) library, providing research support for 150 doctors and the hospital’s nursing staff.

**Development of special libraries and knowledge services**

In his opening remarks as facilitator, St. Clair spoke about the role of the special library and highlighted some of the current changes being experienced by information professionals working in these libraries. He suggested that products and services provided by the special library are different from those provided by other libraries, as special libraries exist to support the particular mission of the library’s parent organization. Consequently, products and services in the special library must by definition be mission-specific.

St. Clair traced the development of special librarianship through its 97-year history, noting that the industry appears to have evolved from providing “practical and utilitarian” information (as described by SLA’s founder, John Cotton Dana). The industry’s current role is to support the management and services delivery methodology characterized as knowledge services (which St. Clair defines as the “convergence” of information management, knowledge management, knowledge sharing, and strategic learning for innovation, contextual-decision making, and research). With its practical focus, the relationship between technology and knowledge is obviously a subject for much discussion and study among special librarians. It is in seeking to understand more about this relationship and how vendors and special librarians can work together to provide better service delivery in the future which brought together these SLA leaders and EOS International management for the summit.

St. Clair noted that in this transition, important events had occurred since the early 1980s. It was then that “intellectual capital” (as designated by Thomas Stewart) began to be recognized as an organizational asset, at about the same time that EOS International was introducing modular database products specifically designed for special libraries. As the relationship between technology and knowledge capture moved forward, it was of course a natural goal for both special librarians and developers of integrated library management systems (ILMS) to seek technology solutions for capturing internal and external information and to seek knowledge-related applications for working with knowledge as an organizational asset.

As the millennium approached, however, it began to be clear that the management link between special librarianship and KM/knowledge services technology solutions was not yet as strong as it could be. In fact, several “realities” (as St. Clair described them) affect the relationship between technology and knowledge and will continue to do so for some time:

- the migration from print to electronic content and collections is happening much faster than anyone predicted
- this fast-paced change is seriously impacting the behavior of users, information professionals employed in special libraries, and leadership in organizations where special librarians and information professionals are employed
- the rallying cry seems to have become something like “collections to connections,” as much work is being done to move to digitized collections as fast as possible because that is what the special library’s users demand
- there are – and will continue to be for at least another generation or so – organizations where printed collections are sought by some knowledge-seeking clients – but that proportion of the client base is shrinking
from the organizational management perspective the special library/information center is seen as a means and not as an end in itself, a concept that distresses many practitioners – management is continually asking (about all services, incidentally, and not just about special libraries) “Is there a better, less costly way to do this?”

With respect to this last “reality,” St. Clair noted, in raising the question special librarians understand that without the established and recognized added value provided by the information professional to the knowledge services process, the special library is vulnerable. It is not a new question for special librarians, for as far back as 1981 SLA President Edward Strable was describing special libraries as “part of the competitive, capitalist society.” That concept is more true today than it ever was, according to St. Clair.

Yet organizations, according to St. Clair, will continue to demand support for innovation, contextual decision-making, and research, the very support provided by special librarians and information professionals in their role as knowledge services practitioners. If there is no special library or other specially designed knowledge services function, those products and services will be obtained elsewhere, at probably at higher cost. Thus it is the role of the special librarian/information professional to know when to add value to the special library’s products and services, and when to move to whatever new and/or different services and management frameworks are required, to ensure that the special library does not become marginalized and, in a worst case scenario, eventually cease to exist.

Those are the issues confronting the profession, St. Clair said, encouraging the dialogue to begin. He asked participants to share their experiences about what SLA’s leaders are thinking, and to describe what they themselves – as leaders in this branch of the profession – are anticipating and predicting for special librarianship. Specifically, St. Clair summed up the questions for the day by asking: What will be the role of the special library in managing organizational knowledge, and what is the next generation of the industry going to be (implying, of course, some attention to what the next generation of the industry will need, as it seeks to strengthen the relationship between technology and knowledge)?

**Special library vis-à-vis organizational leadership**

The group then spoke about the many issues confronting the LIS field. Vargha and Lachance re-emphasized the focus on the information professional, simply because – as the group agreed – that employee performs more than one function (even in a one-person library, or perhaps especially in a one-person library) and such topics as knowledge management, competitive intelligence, marketing, content management (especially the curating and management of electronic content), and similar organizational requirements present on-going challenges, all far beyond the usual concept of librarianship. In fact, as the discussion continued, it became clear that since society cannot seem to let go of the stereotyping many people connect to the term “librarian,” there is little understanding of the need for having the librarian perform these formerly additional but now required roles.

Thus we have a picture of an industry at seemingly at odds with organizational leadership in the very organizations where special librarians are employed. Without bringing the special librarians into the picture, management directives in many organizations are leading, generally speaking (as Vargha and Lachance described the situation), to the shrinking of library staff size, additional budget pressures, and similar constraints, and special libraries are literally required do more with less.

At the service end of the spectrum, top priority services are being refined because clients using the services of a special library are more self-sufficient, requiring that staff members and staff duties be re-arranged to match new service demands and new service levels. As Vargha put it, “Normal is simply a moving target and baselines are shifting.”). The obvious conclusion is that the special librarian/information professional who can balance the ever-growing demands on their professional time is the special librarian who will succeed.

And success is possible, as Vargha and Lachance pointed out. In its recent study of the job market (March 19, 2007), U.S. News & World Report listed the LIS field as one of the 25 best careers, basing the ranking on job growth and the outlook in the job market. In fact, the report noted that “Special librarianship is the field’s fastest growing job market.”

Certainly these new ways of doing business and challenges are having an influence on how some graduate LIS programs conduct their programs. In some graduate programs, for example, LIS studies have merged with other departments and disciplines, evidence of the evolution with technology in the workplace (although there continues to be, according to the experiences of some of the group, gaps between what is being taught and the need for business and management competencies in the workplace, as these are not yet emphasized in the LIS programs).

Distance education, of course, is a powerful force in LIS programs, and as the various LIS programs have developed, there appear to be two tracks – Information Science (IS) and Library Science (LS) – taking hold. In this context, some schools have
designated themselves as “i schools,” a phenomenon in the LIS field that has developed over the last decade or so. Nevertheless, annual statistical reports of LIS graduates do not reflect the move toward the development of an information-focused career or the development of more business, management, and other interdisciplinary competencies at the LIS level. In fact, according to statistics presented by Lachance and Vargha, in the 2002-2003 academic year, 5,175 MLS degrees awarded, a 5% increase over the previous year, but only 587 MSIS degrees were awarded. As for how many of these graduates went to work in special libraries, these placements are measured against a different standard so only a rough generalization is possible, but for the years 2004 and 2005, it appears that somewhere around 113 and 121 graduates were placed in special libraries respectively. That is definitely not very many placements in a field in which the total number of graduates is around 5,000 or so.

Relationship between technology and knowledge

As to the role of technology in the future special library, all agreed that such predictions are obviously risky, but with the experience and leadership skills of the participants in the EOS International Summit, it is certainly appropriate to make “educated” guesses. One subject that intrigued the group was the fact that new graduates of LIS programs are “digitally aware,” so to speak, but they are not technically adept behind the scenes of the special library or information center. New workers are expected to know about technology and to have such skills as the ability to build web pages, maintain databases, and similar tasks, and many of them do have these skills, but they are not coupled with what the participants identified as “real” resources, the content that enables the information professional to get to the required captured knowledge as quickly as possible (turnaround time and speed are a basic performance indicator in the special library workplace). The group also noted, in this context, that the information center’s clients are seeking “wizards” to guide them to the proper resources, although whether those wizards are to be electronic or personal has not been determined yet. The group suggested that it will probably end up being both, depending on the individual client’s needs at the moment).

Related to these client needs is a desire, on the part of the special library’s clients, to have access to a collaborative workspace (or more than one, if it can be arranged). Much discussion ensured about these new tools, and the 3-D virtual world Second Life, entirely built and owned by its residents, was described in much detail (with the added comment that one of the participants had heard that Second Life is being integrated into some special library operations, particularly the “Information Island” location found on Second Life). All of which was the group’s way of connecting their clients’ needs with what they themselves, as special library managers and information professionals, wanted for their users: a single point of access to all the information/knowledge/learning that the clients require, including journals, databases, digitized content, etc.

Relationship between managers of special libraries and vendors

The discussion then segued into the subject of the relationship between the special librarian and the vendor. Specifically, Saadat asked, how does the vendor persuade the prospect or the client to see the vendor as a partner, and not strictly as a sales person with a product to sell? As an example, Saadat raised the issue of the closing of special libraries, wondering why when Saadat asked, how does the vendor persuade the prospect or the client to see the vendor as a partner, and not strictly as a sales

A lively discussion followed, with participants seeking to identify how vendors and special librarians can work together not only as advocates and sponsors for current knowledge services delivery, but from a bigger picture perspective, working within the parent organization to identify mechanisms for working with organizational leadership. The need for managing information, knowledge, and strategic learning will continue to exist, and the vendor can work with organizational leadership (and, not incidentally with the special librarian/information professional as well) to ensure that services continue to be delivered. The consensus of the group was that in both industries (that is, in both special librarianship and in the vendor community), there is a need for a more analytical approach and a move away from the reactive role, which seems to be how information professionals vendors currently think about their roles. At this point in the discussion, specific actions recommended by the group had to do with actively bringing vendors and special library managers to the table to work with senior leadership in the organization.

There was not total agreement. Some of the group pointed out that the role of the vendor in supporting organizational initiatives would probably be looked upon with skepticism in some companies, as just another “selling” opportunity. Others, however, pointed out that regardless of the specific system in place in the organization, simply having contacts with and participating in professional activities with vendors lead to an open and more broad-based framework for vendors, special librarians, and organizational leadership to work together (or at least to know and recognize each other’s abilities for leadership in the workplace and with respect to specific technology/knowledge situations).
One methodology for moving in this direction, it was suggested, is to look to the hierarchy-of-change technique,* a tool being used in many organizations and industries when change management and change implementation are required. It is a tool that can apply as vendors and special library managers seek to move beyond the management of a special library and more into the enterprise-wide knowledge services arena. Discussing the special librarian/vendor collaboration and seeking to influence the future of the profession, the following was put forward:

The group discussed how every organization has, or should have, an established set of principles that convey the organization’s vision, mission, and values:

- The vision statement, defined by one organizational development authority as “an image in words of what success will look like,” emanates usually from organizational leadership or groups of leadership, and is subject to change as the environment or circumstances change§

- The mission statement “communicates the essence of the organization – why it exists” and incorporates corporate/organizational goals – the mission, too, is subject to and does change, but not with the frequency of the organizational vision

- The organization’s values statement or philosophy is generally thought of as “the principles or beliefs which guide stakeholders as they pursue the organization’s purpose,” essentially the core values that inspire everything the organization does and how it is done” – in the successful corporation or organization, these values do not change – in fact it is the organization’s values that are often the bond that holds a company together

Continuing the discussion, participants sought examples for enabling vendor/special library manager collaboration, and one concept put forward was to look at the special library’s role in the organization and the operational impact of its products and services. As one participant put it, in her organization “if they took it away, the company would fall apart,” a recognition that the special library is, indeed, a means to an end for the organization (however that end is defined). The fact that the function is a “library” (or some similarly designated function) almost becomes irrelevant when it is understood that it is the service provided – and not the operational function as a function – that contributes to organizational success. From the collaborative perspective, for both vendors and library managers, the issue becomes one of identifying the cheapest and most efficient way of delivering

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* The reference here, of course, is to change management and change implementation, attention to which is a strong component of looking at any new direction. Depending on which study is used, it is now generally recognized that between 60% and 70% of any type of major implementation change in organizations fail, and as much as 87% of the failures are the result of human factors.

§ These definitions are adapted from those suggested by Michael Allison and Jude Kaye in Strategic Planning for Non-Profit Organizations (New York: John Wiley and Sons, 1997).
the required products and services. With this, the group began to discuss enterprise content management (ECM) and the value to the organization of having the special library as the central knowledge services function – the knowledge nexus – for the organization.

In seeking to identify further ways in which vendors could work with special librarians and information professionals, participants discussed the value of creating and managing the organizational “knowledge store,” so that all required information materials, forms, research materials, etc. are in one location, accessible from the user’s desktop. A methodology for this type of service was discussed. At the same time, the group gave some attention to how a knowledge services template could be developed and customized for the organization, so information about unstructured materials would be available in the organization. This idea led to a discussion of the value of an enterprise-wide search engine, enabling the management of all internal information and thus demonstrating once again that the breadth of skills the special librarian is expected to have.

As the group began to wrap up the discussion, it became clear that if EOS International as a company expects to have a more participatory role in the special libraries workplace, some thought might be given to re-conceptualizing the company. It was agreed that EOS International is definitely on the right track with its on-going message to its prospects and clients, as stated in the question, “How can we help you do your work?” The next step, according to some of the SLA leaders present, was to move to the idea of “How can we help you take your work out to the rest of your organization?” With this direction, EOS International could position itself as a software solutions company that is interested in working with its clients in the larger organizational environment and not limiting its exposure to the special library.

There was not total agreement. Some expressed concern that this approach would not work because there is already a resistance to vendors and there is already some antagonism to vendors, especially if they are perceived by some professionals as being too active in the field. On the other hand, it was suggested, if the special librarians could be embedded with the line of business professionals – the vendors who are offering the products – a mutual and natural alliance could be built, and both vendors and information professionals could work together in a collaborative situation.

At the end of the day, Saadat stated that it is the goal at EOS International to work with the special libraries community as experts, as teachers and trusted professional colleagues, and not necessarily as sales people, and the company expects to go forward in building that trust. Suggestions for moving in this direction included the preparation of case studies on how the company’s staff or product has helped make information professionals “stars” or assisted the parent organization in achieving some goal that it would not have achieved without the collaboration of the special librarian and the vendor. A final recommendation encouraged vendor management and staff to become more involved in SLA’s professional activities, particularly by attending chapter meetings, networking at conferences, participating in professional development programs, and similar activities.

A last conclusion for the participants was the group’s agreement about the strong future for special librarianship as an organizational function. They concluded that in imagining the future, with their own experiences and backgrounds providing them with an assess the current situation and the ability to identify results being provided to their parent organizations, they are able to predict a growing demand for knowledge services in the workplace. At the same time, recognizing the realities and responsibilities of organizational leadership, the group also understands that services and products provided to the parent organization might not necessarily be provided through an operational function referred to as a “special” or “specialized” library.