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Lois Ireland at Freddie Mac: Managing the Knowledge Services Hub

by Guy St. Clair



If there is a central theme to the concept of knowledge services, it has much to do with service delivery throughout the entire organization. Although there are exceptions, most of us in the field generally recognize that knowledge services—as an operational function—exists for the benefit of everyone in the enterprise who requires information, knowledge, or strategic learning for their work. Our job is to provide service delivery and link that need—regardless of where it originates in the parent organization—with the appropriate solution. In other words, we’re the organization’s knowledge services “hub,” and it is our job to manage that hub, to provide a central focus for any query from

anywhere in the organization.

This attention to a broader focus for our services is not a new idea. In fact, the idea of the knowledge nexus or knowledge hub has been around for a while, and some of us can recall the attention to “one-stop shopping” in the specialized libraries field back in the 1980s. But things are different now. For one thing, in today’s workplace the idea of the centralized knowledge resource is beginning to fall into place beyond our own profession. As managers and enterprise leaders come to recognize the true value of knowledge services in the successful achievement of the organizational mission, the concept of a central knowledge focus is now seen as the appropriate methodology for providing service delivery for the larger enterprise.

At Freddie Mac, Lois Ireland is a committed proponent of the idea of the knowledge hub. Working in a high-energy research environment (and a particularly demanding work environment in the current economy), Ireland and her staff see their role as knowledge advisors to the large number of employees who support Freddie Mac’s work, both in the several offices in McLean, VA, where the main headquarters is located, and in regional offices located throughout the United States. They recognize that Freddie Mac, so large and so diverse (there are some 5,000 employees), cannot have its work impeded or its mission thwarted by cumbersome and distracting service delivery, and they make special efforts to bring their skill sets and professional competencies into play for the benefit of their users.

A quick example has to do with Ireland’s approach to new hires. As in any large corporation, the first few days on the job are far too busy for new employees to concentrate on understanding the various organizational functions available to them, so Ireland and her team make sure that a few days after their start date, new hires receive a welcoming e-mail (notably unpressured in tone), with descriptive information about the Freddie Mac Corporate Information Research Center (CIRC) and links to a few key resources. They make it clear that CIRC is there to work with the new employee and they offer an appointment or a training session at the employee’s convenience. It is a valuable and—at the same time—helpful approach for the new employee, letting that person know that CIRC is available, but without building expectations that might make for an awkward later interaction.

And it is not a difficult step to implement, since the Freddie Mac CIRC is situated organizationally as part of the corporation’s HR and Corporate Services division. While in some companies there might be value in a different organizational placement, say in one of the company’s specialty practices or in a special research function, that is not the case at Freddie Mac.

“What we have here,” Ireland says, “is a more fluid sort of framework, and I think it might be an advantage to not be so strictly located. It doesn’t matter where we sit on the org chart—we work with everyone.”

That statement sums up Ireland’s thinking about her work and what the Freddie Mac CIRC—under her leadership—is bringing to the company. And why she and her team, with the whole-hearted support of her managers, have the on-going goal of positioning CIRC as Freddie Mac’s knowledge services hub. The company is a large organization with a multi-faceted operational framework, and if they can establish one functional unit as the preferred (and first-thought-of) source for information, everyone in the company will reap the benefits.

Chartered by the U.S. Congress in 1970, Freddie Mac is not, despite the misunderstanding of some citizens, a government agency. The company is what is known as a GSE—a government sponsored enterprise—with a government charge, government regulators and such, and its goals are chosen in balance with the U.S. Department of Housing and Urban Development, but it is not an agency of the U.S. federal government. It is a stockholder-owned corporation that concentrates on lowering housing costs and providing better access to home financing, “to keep money flowing to mortgage lenders in support of homeownership and rental housing,” as the company is described on its web site (www.freddiemac.com/). With this focus, the company hopes to bring the benefits of the secondary mortgage market to families and communities throughout the United States, a goal which Ireland says is easy to get behind and which inspires many of the staff who come to work for the company, including herself.

In fact, thanks to the company’s successful public relations effort, the mission spelled out on the company’s site is very specific: “to provide liquidity, stability, and affordability to the housing market.” Or put another way, the company wants to stabilize the nation’s mortgage markets and expand opportunities for home ownership and affordable rental housing. It is a clearly stated and noble mission, and the statement serves as a point of pride for Ireland and her team and the people they work with at Freddie Mac.

“Supporting housing for all Americans just makes sense,” Ireland says. “I think all of us as working professionals want to be associated with something we approve of and believe in. Being in a position to provide direct support for the company in achieving this mission is naturally a positive driver for all of us. Certainly it affects the kind of work we try to do with CIRC. If my staff and I can contribute to helping lower housing costs for Americans, we want to be part of that.”

It might be that this kind of thinking has been influencing Ireland throughout her career. Originally from Maryland, she had her graduate education at the University of North Carolina at Chapel Hill, in the School of Information and Library Science, and while there she was involved with the contract program that the school has in place with the U.S. Environmental Protection Agency (EPA). Following her graduate education, Ireland had a brief stint as a public librarian, an experience she found extremely valuable. In fact, Ireland feels pretty strongly that all librarians and information professionals should have some public library experience, “to get a feel for what is being asked of libraries in the larger public community,” as she puts it, “in the real world.”

That broad-based library experience obviously influenced Ireland as she moved forward with her career, for soon after her work in the public library, she was recruited by Labat-Anderson to come to Washington to work on a contract for the EPA. She worked for that agency contract for seven years, giving her considerable exposure to the management issues and service delivery framework required for a large research/regulatory organization.

“It was good experience,” she reflects, “if for no other reason because I could learn how critical it is for library and information managers to understand the larger focus of the parent organization. That has to be brought into the picture, and not just in a casual way. Whatever services we are providing, whether it’s through a library or an information center or some other function, it has to reflect the goals of the larger organization. Some of us forget that sometimes, and that’s not very productive.”

As it happened, in another of those in-the-right-place-at-the-right-time situations, after those seven years at EPA Ireland was ready for more senior managerial responsibility and Freddie Mac was ready for a new manager for its information services unit. She answered the advertisement and was delighted to learn that she would be hired for the position. She was also a little surprised, because she was expecting Freddie Mac management to be looking for someone with a financial or business information background but that was not the case. The company had that covered, in a very good reference librarian who had that specialty—what

Freddie Mac management was looking for someone with managerial experience who could lead CIRC as the company evolved what would become its knowledge hub, providing knowledge services delivery wherever it is required and to any member of CIRC's identified user base.

Since she has been at Freddie Mac, Ireland has been successful in meeting this challenge. Among her techniques is a pretty serious commitment to getting the word out, ensuring that people in the company know what CIRC is and how they can use its services. Already mentioned is the approach she and her team take with new hires, and a daily electronic news tracking service meets with a warm reception from company staff. The team has also experimented with a variety of workshops, trying to increase knowledge and understanding of CIRC resources. The most popular recent offerings include techniques for advanced Google searches, which has been a great success with employees. CIRC staff have also started sponsoring audio-conferences conducted by a mortgage industry publisher. "We pay the connect fee, set up the room and post a notice on day and time. We're getting a steady crowd of employees from across the company attending these sessions," Ireland says. One technique, which Ireland credits to SLA leader Anne Caputo, is judicious use of the quick greeting and summary. Caputo advises colleagues to polish up their "elevator talk" so that an unexpected and speedy conversation can provide an opening to discover people's information needs. Ireland laughs, and notes that it is a technique she tries to use often, asking people what they are working on and giving them a brief indication of how they can use the CIRC in that work.

"What we're seeking to do," Ireland says, "is to build CIRC's reputation, and we can't always wait for our users to come to us. So we work hard to ensure that people recognize us and understand what we can do for them, and we've had good success. Not everything works as well as we want it to. For example, we angled to get invited to the division town hall/all-hands meetings and we attempted to participate, but it really didn't turn out to be useful for us in terms of gaining insights into the work of the division and what their information needs would be. So we're looking to meet that challenge by doing some re-focusing, targeting some new direction in certain business areas."

That effort, as Ireland describes it, is built around identifying new groups in the company and meeting with them for a 30-minute discussion about what they are working on, particularly in such areas as enterprise risk and related topics. It's part of a larger goal to identify and, where possible, establish an influence in helping the company strengthen its knowledge culture, the organizational understanding of the role of knowledge and its influence in corporate success.

"It could be a little stronger," Ireland says, speaking of the knowledge culture at Freddie Mac, "and I think our work is going to result in adding some strength there. That's why we're working hard at getting CIRC and its services recognized throughout the organization. The more recognition we have, the better our overall service delivery can be. And I'm optimistic about how it will all turn out."

The definition of a knowledge hub may be a little different at Freddie Mac than at other places, as Ireland's team encompasses more than just the traditional information center. What all these functions have in common is connection—connecting people to people or people to information resources. A primary example is the ease of use of CIRC resources, since Freddie Mac employees can gain access to CIRC's resources from anywhere they happen to be, as long as they have access to the Freddie Mac intranet. Another example has to do with the provision of reference services as a specific service. Reference Librarian Scott Bride has this responsibility, finding the right resources inside and outside the company to respond to information queries. Ireland notes that Bride is constantly scanning for news stories, analyst reports, and other items of possible interest for his customers. Because he knows which groups are working on what, Bride is often able to link business areas across the corporation that have similar interests or needs.

Another "connections" employee is Glenda Gibson, who handles technical services tasks, such as serials control and circulation, and also monitors the corporate switchboard. Run through a combination of an automated voice recognition system and outsourced personnel, the switchboard connects external callers, Freddie Mac's customers and shareholders, with the appropriate employee or department. Similarly, corporate taxonomist Erin Clougherty partners with the records management staff to develop file structures and controlled vocabulary for business areas as they begin using Freddie Mac's document management system. Clougherty also partners with the corporate intranet team on organizing and tagging intranet pages, and advising on overall navigation. In addition, Clougherty manages communications from Corporate Services,

which includes developing website content for the varied functions within the division, making it easier for employees to stay informed.

The newest service focus for Ireland's team is videography/media services. Video Production Manager Monique Paige-Camarillo, videographer Mike Bachman and media streaming specialist Nick Stevenson record and stream meetings, events and other sessions throughout Freddie Mac's offices. "The technology allows employees separated geographically to participate in ways they haven't before and to feel more connected to what's going on at our main campus. It also allows those who couldn't attend a session to view it at their convenience," remarks Ireland. "It's another way to share knowledge." Overall, Ireland anticipates using the library science skills among her group to help organize and tag the growing number of video files for easier retrieval.

Having these functions together under one umbrella positions Ireland and her team with a wealth of connections across the corporation. These people know who to contact for internal information, and they have the expertise and familiarity with outside resources. "These functions all look very different on the surface," Ireland says, "but they're all about finding the right information, whether it is for an economist looking for a research paper, an investor asking for an annual report, an employee checking the daily cafeteria menu, or watching a video file of a division town hall meeting. The searcher has a need to know, and we can help him find his way."

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