

THE EMERALD HANDBOOK OF
MODERN INFORMATION
MANAGEMENT

THE EMERALD HANDBOOK OF MODERN INFORMATION MANAGEMENT

EDITED BY

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INVESTOR IN PEOPLE

*For Alice,
Whose support helps make this work possible*

As information professionals, we are constantly renewing how we define and value our roles. This handbook provides info pros at all levels with thoughtful chapters on strategies to address our most challenging issues. This is truly a resource to return to regularly rather than the one that is read once and put on the shelf.

– *Mary Ellen Bates, Principal, Bates Information Services Inc.*

This is a very useful and innovative book for anyone seriously involved in the management of information. There have been other such books but this one is very up to date, candid, and curated by two highly experienced practitioners and scholars of the subject. I highly recommend it!

– *Laurence Prusak, Knowledge Strategies LLC.*

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Mr. Bednar has a BS in Music Education from Berklee College of Music, has a Masters of Library and Information Sciences from Simmons College, and is a Certified Records Manager. He has been a member of ARMA International for over 20 years and has served at the chapter and regional levels. As of 2017 he is incoming region director for ARMA's Northeast region.

Linda Berube is Senior Research Associate in the School of Art, Media, and American Studies at University of East Anglia, UK. Starting her career in the United States as an academic and public librarian, her work in the United Kingdom, following a Fulbright Fellowship, has been in project and research management in the areas of ebooks, digital reference services, the legal deposit of digital publications, and information management. She is the author of *Do You Web 2.0?* and *Information Management: Mission Critical*.

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Larisa was a 2006 recipient of the prestigious Karen J. Switt Leadership Award for her pioneering work in global information management. She won the SLA Best Conference Paper Award in 2008 for innovative approach to and successful implementation of a library global sourcing initiative in India. Prior to Franklin Templeton, Larisa worked as the first Head of Reference & Information Services at the largest, one-of-a-kind, combined public and

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Jack Cahill has worked at Wellington Management and Fidelity Investments for over 20 years with a focus on finance and investments and management of research and market data services. For the past 8 years, he has managed Research and Instruction for the Babson College Library as well as the Cutler Center for Investments and Finance. With deep curriculum and research faculty project involvement in finance, entrepreneurship, business analytics, marketing – both blended and standard, grad and undergrad – Jack is always looking for best practices to implement and share.

Cynthia Cheng Correia helps professionals and organizations enhance what they do. For over two decades, she has helped managers and companies develop their competitive intelligence (CI), critical foresight, and strategic capabilities through advising, training, improving processes and practices, and applying effective tools and methods. Her expertise extends into the combined disciplines of CI and knowledge management (CIKM). Cynthia's practice includes intelligence defense; open source intelligence (OSINT); and identifying and minimizing cognitive biases, silos, and other barriers to research, analysis, collaboration, problem-solving, knowledge, and intelligence generation, and decision-making. A member of the Council of Competitive Intelligence Fellows, Cynthia is a distinguished leader in the CI field and has committed herself to advancing sound intelligence practices through advising, championing, mentoring, and educating. She is a frequent speaker and has appeared in leading publications, including *Super Searchers on Competitive Intelligence*, *The*

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Helen has presented at conferences including Taxonomy Boot Camp and Text Analytics World. She has published widely on knowledge management, business research, and text analytics. Publications include *Robust Text Analytics Require a Human Element* (Mighty Guides, 2016), "Insider Knowledge – Working as a Text Analytics Manager" (JInfo, 2016), and *Establishing a Successful Knowledge-Driven Culture* (Ark, 2013).

Kaia L. Densch, as the outreach and education manager at Cargill InfoCenter, goes all out to drive awareness of the InfoCenter's capabilities and resources, while helping individuals become better at using the tools and data available. She also works with many businesses on innovation and ideation, and spreads the word about copyright wherever she goes. Kaia has a diverse background with extensive global experience. Before joining Cargill in 2010, she worked at Thomson Reuters for 10 years where she established and managed corporate libraries in 11 countries around the world, led the learning technologies group, and worked as a library customer relations manager. Kaia also has experience in library systems development and customer support from two ILS companies (automated library systems) in Chicago, and she began her career as the assistant archivist of Northwestern University. She holds a Master's degree in Library and Information Science from Dominican University.

Ulla de Stricker, with experience since the late 1970s in the information industry and in information-related operations, focuses her consulting practice on strategic planning for an organization's information and knowledge management policies, practices, and delivery mechanisms (including, where relevant, specialized information/knowledge centers). Engagements involve modernizing existing information operations or developing plans for new information services and relationships tuned to the activities and requirements of today's intellectual workers. She is known for her experience and expertise in examining "how an organization works" and in devising practical strategies for enabling employees to find, capture, share, and protect the knowledge they apply to the task of delivering value for stakeholders.

A well respected authority in the information field for decades, Ms. de Stricker has written and presented extensively on topics related to knowledge management and the organizational cultures driving the associated decision making. One of her books is entitled *Business Cases for Info Pros: Here's Why, Here's How* (Information Today), and she is the editor and co-author of *Knowledge Management Practice in Organizations: The View from Inside* (IGI Global).

Prior to establishing her practice (www.destricker.com) in 1992, Ms. de Stricker held senior customer facing roles in the information industry. She earned an MA and an MLS from McGill University in Montreal.

Susan S. DiMattia is a consultant and educator headquartered in Stamford, CT. She has taught on the adjunct faculties of four library schools, specializing in Special Library Management, Marketing, Leadership and Management, and Communication Skills for Information Professionals. Her consulting projects have involved working on products with business information content, conducting staff training sessions, and evaluating library collections in business and finance fields. She holds the MLIS from Simmons School of Library and Information Science and an MBA from the University of Connecticut. In addition to appointed and elected offices in the American Library Association and the Special Libraries Association, she is a Past President of the Special Libraries Association. She volunteers with several non-profit organizations in children's services, music programs, and Friends of Libraries groups.

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Chris Flegg was Bodleian Business Librarian, responsible for ensuring that the Sainsbury Library as a well-functioning and appropriate working environment for the many library users that use the facility either as their main library of choice or as occasional visitors.

She was also responsible for building the collection, both print and digital, that best support the reading requirements of Saïd Business School's programmes and the broader research data needs of faculty and researchers of the University of Oxford, working in the fields of management, business and finance. Prior to working at Saïd Business School, Chris was the Librarian in Charge of the McLennan Library, Melbourne Business School, and prior to that, the Assistant Information Services Librarian at the Baillieu Library, the University of Melbourne, Australia.

Chris has a BA from The University of Melbourne, a Graduate Diploma in Information Science from RMIT University, Melbourne, and a Post-Graduate qualification in Editing. While in Australia, Chris was the co-ordinator of the APBSLG (Asia-Pacific Business Schools Librarians' Group) and is now Secretary of the EBSLG (European Business Schools Librarians' Group), a group of the Library managers of the top ranked business schools in Europe.

In addition to speaking at conferences Chris has published on the future of business school libraries of the 21st century and on the growing need to nurture the business and societal impacts of academic research by providing ongoing alumni access to deep, broad, and quality information as a lifelong learning tool. Chris retired from the University of Oxford in September 2017.

Laura Garza joined Praxair in 2008 as a HR Director for Mexico, leading all Human Resources, Communications, and Social Responsibility activities for all Mexico and Central America. In 2012, she was appointed Director of Global Training and Development where she led globally all corporate-development programs and employee-development activities. In 2014, Laura was appointed Executive Director, Talent Development and Human Resources, where she is performing a dual role: leading all talent development succession planning, performance management, and employee engagement initiatives corporate-wide and also is lead HR for Praxair Surface Technology, a Praxair subsidiary of approximately \$1B revenue with presence in 17 countries. Laura had lived in the United States and Mexico and has had temporary assignments in China and Portugal performing HR responsibilities in critical startups and acquisitions. Laura was mentioned among the 100 most influential women in Mexico by *CNNExpansion*. A native of Monterrey, Mexico, Laura earned a degree in Mechanical Engineering and an MBA at DUKE University in North Carolina, USA. Praxair is the largest industrial gases company in North and South America, and one of the largest worldwide, with 2014 sales of \$12 billion.

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tools, and methods. She works with a creative team of researchers, developers, taxonomists, archivists, historians, product owners, and interns. She manages RAD's research and fact-checking initiatives, metadata creation and tagging, audio archives, and transcription and information vendor relationships. Throughout all of RAD's work, Glendinning instills in her team a commitment to accuracy and excellence, putting a premium on visibility and transparency. The RAD team is responsible for the development, stewardship, and deployment of Artemis, NPR's digital archive of radio audio, transcripts, and metadata dating back to 1971. Glendinning is working with the Artemis team as they expand the archive to include NPR stories in all formats and as they strengthen NPR's unique taxonomy. An important component of RAD's portfolio is training and outreach, and she directs those activities as well as guides RAD's burgeoning social media presence. Before she joined NPR in 2004 as a reference librarian, Glendinning worked in librarian and researcher positions at the Freedom Forum, *ABC News*, LexisNexis, and the Association of American Medical Colleges. She also served as a VISTA volunteer with an adult literacy program in Baltimore. Glendinning earned her degrees from the University of Pittsburgh and Johns Hopkins University.

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Lynne C. Howarth is a current Professor and former Dean at the Faculty of Information (iSchool), University of Toronto, Canada. She completed her PhD in 1990 and was appointed to the Faculty of Information Studies the same year, becoming Dean in 1996. She served in that position until 2003. Between 2011 and 2013, Howarth completed a two-year affiliation as Distinguished Researcher in Information Organization at the University of Wisconsin–Milwaukee iSchool. She was honored with the Distinguished Scholar Lectio Magistralis in Biblioteconomia, Florence University, Italy, in 2011, and presented with the ALISE/Connie Van Fleet Award for Research Excellence in Public Library Services to Adults in 2016. She conducts research, publishes, and teaches in the areas of knowledge organization, metadata standards, and the provision of information to marginalized populations. She continues to serve on international standards committees for metadata, Semantic Web, and linked data applications. She has been a member of the IFLA Cataloguing Section, and currently of the Subject Analysis and Access Section. She has served on the ISBD Review Group, the IFLA Namespaces Task Group, the ISBD Linked Data Study Group, and the Study Group on Future Directions of the ISBDs, among others. She has also been a voting member of the Canadian Committee on Cataloguing, and the American Library Association Committee on Cataloging: Description and Access. As a beekeeper-in-training, she is hoping to learn why honeybees are so successful in organizing and sharing the knowledge of the hive.

Sylvia James has worked in information management for over 40 years. Most of her work has been as a business researcher and consultant advising on projects in all kinds of information services, libraries and archives, and to information providers and publishers. Her specialty is in finance and investment. She

was Head of Information, Library and Archive at Credit Suisse First Boston, a UK investment bank, for most of the 1980s. She formed her own consulting business in 1989 and has worked on research projects and training on research methods all over the world for major corporations. She has also consulted for many years as an archivist, who specializes in advising on, retention, reviewing, and cataloguing private archives in many different types of organizations as well as for families and individuals. Major projects have included working on the Macmillan family and company archive, especially focusing on the papers of former UK Prime Minister, Harold Macmillan; for the Government of Mauritius advising on the country's public and private archives; and for the Nuffield Trust, a health think tank in the United Kingdom.

Sylvia James has also written extensively on research and information with many papers in journals such as *Real Business* (UK), *Business Information Alert*, *Legal Information Alert*, *Business & Finance Bulletin* – SLA Business & Finance Division newsletter, *Business Information Review*, *Journal of Business & Finance Librarianship*, and *Freepint VIP*. She resides in the United Kingdom.

Rebecca Jones is Director of Branch & Neighbourhood Services at Brampton Library, responsible for neighborhood branches in one of Canada's fastest growing multicultural cities. Rebecca came to libraries through a corporate route, starting her career as a librarian at the Royal Bank of Canada and then as a Manager in information services, records management, and technology training at Imperial Oil Ltd. Founder and partner of Dysart & Jones Associates since 1992, she managed more than 100 cross-functional projects in strategic and business planning, performance measures, organizational design, service reshaping, and management projects, and was also Director Professional Learning Centre at University of Toronto's iSchool. A Fellow of the Special Libraries Association (SLA), a recipient of SLA's Leadership Award and LMD's Mentoring Award, she was delighted to be named Ontario's Public Librarian of the Year, and to receive Canada's Outstanding Service to Librarianship Award. She considers herself as incredibly lucky to have gone from being a kid who knew nothing of libraries to now having colleagues and friends throughout Canada and the United States who make her laugh, think, change her opinion, learn, and continue to work in a sector that spans industries and positively impacts thousands of lives.

Mary Lee Kennedy is Principal of The Kennedy Group. She is committed to initiatives that create systemic change so that communities can leverage credible information and gain knowledge to achieve educational and economic aspirations. As Senior Associate Provost for the Harvard Library, Chief Library Officer of The New York Public Library, Director of the Knowledge Network Group for Microsoft, and 14 years as a consultant, she has significant leadership experience transforming global information and knowledge-based institutions to deliver on their mission in a world in which physical and digital lines

are blurring, expertise in creating innovation communities that deliver substantive results in local and global settings, and a background in activating policy development that empowers people in a networked world. She contributes to thought leadership bodies such as the Social Science Research Council, the Aspen Institute, and the Cyberlearning community at the National Science Foundation, in order to advance scholarship, open access, a lifetime of learning, and “smart” and connected communities for today and for the future. Fluent in Spanish and conversational French, Mary Lee has worked in every continent except Africa, including nine years living and working in Mexico.

Marian Krupicka began as a volunteer with the Darien Volunteer Library in 1980. She then served as a trustee with the Darien Public Library from 1982 until 1984. Marian worked on the merger of the Willowbrook and Darien Public Libraries and has served on the Indian Prairie Public Board of Trustees from 1984 to the present, currently holding the office of Treasurer. Marian taught Reading and Language Arts for 35 years at Eisenhower Junior High School, Darien, Illinois.

David Leonard, President of the Boston Public Library, leads the 170-year-old institution, one of Boston’s great educational, cultural, and civic treasures. David began working at the BPL in 2009, bringing a wealth of experience from the technology, management, and consulting fields. Appointed president by the Library’s Board of Trustees and Mayor Martin J. Walsh in June 2016, David’s focus is on developing the BPL as a twenty-first century institution providing dynamic library experiences to the residents of Boston, of Massachusetts, and beyond.

Boston Public Library has a Central Library in Copley Square, has 24 neighborhood branches, has an archival center, and also serves as the “Library for the Commonwealth” of Massachusetts. In his role David oversees a collection of more than 23 million books, maps, manuscripts, prints, and an expanding digital collection.

Prior to his appointment as President, David served as Interim President for one year. During that time he focused on the completion of the \$78 million renovation of the Central Library in Copley Square, which opened in July 2016, as well as a significant number of branch and collections management improvement projects, enhancing access and the customer experience; collaborating with city departments and with local cultural institutions; and supporting Mayor Walsh’s arts and culture vision.

During his time at the Boston Public Library, David has also served as Director of Administration & Technology, acting Director of Administration & Finance, acting Chief Financial Officer, and Chief Technology Officer. He led the Library’s capital improvement project for the Norman B. Leventhal Map Center, worked to modernize the library’s technology infrastructure –

including the migration to the new Integrated Library System, and deployment of new Pay-for-Print Systems system-wide – and oversaw master planning and design for the renovation of the Central Library in Copley Square.

David initially pursued an academic career, transitioned to the non-profit sector, and then spent 10 years in the private IT consulting world in roles that spanned business development, management, and technology consulting, working on both strategic and tactical projects and services. David is currently enrolled in a PhD program in Library Information Science at Simmons College. He holds a Bachelor's Degree in Philosophy and Mathematics and a Master's Degree in Philosophy from the University College Dublin.

Crystal Megaridis is Manager, Library Services, at Praxair Inc., a global Fortune 300 industrial gas company. Crystal has been involved in the world of libraries for over 25 years. In addition to managing a special library, she has served on the Board of Trustees for the Indian Prairie Public Library District in Darien, Illinois, for the past 12 years. She is also a lecturer for the iSchool at San Jose State University in California. She holds her MLS from Dominican University in River Forest, Illinois.

Christopher Moffat is a native of Atlanta, Georgia. He received a Bachelor of Science from Georgia State University and received a Master of Library and Information Science from Valdosta State University. He joined Georgia State University Libraries in 2016, and currently serves as Associate Department Head for the Clarkston Campus Library. His previous job was serving in a variety of roles within Gwinnett County Public Library. Hobbies include hiking, cooking, and reading about business, investing, behavioral economics, and finance.

Leigh Montgomery has been a special librarian for 20 years. She is currently Electronic Resources Librarian for the Massachusetts Trial Court Law Libraries, a public, state-wide law library system that provides access to legal information for Massachusetts citizens. She is the former librarian at The Christian Science Monitor.

Robin Neidorf is Director of Research for Jinfo Limited, an analyst firm that tracks and consults on changes in information management, strategy, and operations. In this role, Robin has worked with information managers in such diverse fields as banking, professional services, insurance, manufacturing, technology, and government. Most projects involve helping the information team position themselves, their skills, and resources at the strategic center of the business. Prior to joining Jinfo in 2006, Robin ran a research and communications consulting firm for 10 years. She is an in-demand speaker and workshop facilitator for information-focused events in North America and Europe.

Willem C. Noorlander is Partner at BST America and has over 30 years' experience in financial services, including 12 years as a senior Market Data executive at a major global bank. He has taken this experience and knowledge to set up, along with other partners, an Information and Market Data Consulting and Outsourcing firm, BST America, where he has been responsible for the Market Data Consultancy Practice of the New York office for the last 15 years. Bill is skilled at analyzing vendor content, understanding supplier/product nuances and usage requirements and rights, and strategizing with clients on negotiation tactics aimed at cost reduction and maximizing the value of client's agreements with the data suppliers. Prior work experience includes the management of financial, operational, mid- and back functions at several global banks. Bill's career and focus has been global including several overseas assignments.

Stephen Phillips is Executive Director and Global Head of Business Information Services, Morgan Stanley. He believes that effective information management (IM) is essential if the modern organization is to optimize its operations and differentiate its offer from its competitors. With over 30 years' experience in the information industry, Stephen is a member of the Chartered Institute of Librarians and Information Professionals, where he served on the IM Steering Group and is Vice Chair of the Knowledge and IM Special Interest Group. He is a Fellow of the Special Libraries Association, where he served as Chapter President of SLA Europe and represents SLA on the board of the UK IM Alliance. He chaired the Perfect Information Conference on several occasions, facilitated a number of industry events, and spoken at the European Business Information and CILIP Conferences. He is a passionate advocate for the profession in the private sector, encouraging professionals to take a commercial, entrepreneurial approach to their operations in order to ensure their continued relevance to the organization. He and his management team at Morgan Stanley developed a highly commercial approach to resourcing the IM function. This strategy has evolved into a blended model that seamlessly combines employees and third party providers to deliver a global, 24-hour service 6 days a week from 8 locations, from Tokyo to California. His experiences have defined the strategies detailed in his chapter.

Anne E. Rogers, trained as a chemist and an information professional, has been in the knowledge and information business for more than 30 years. She spent 20 years with The Dow Chemical Company where she held many different information-related positions, including management of a number of proprietary R&D information collections. Coming to Cargill in 2004, Anne was responsible for leading knowledge management (KM) initiatives for R&D and establishing a new enterprise idea management system. In 2012, she added responsibility for the InfoCenter Research & Knowledge Services, which provide expert information research to the businesses, acquire the best information

resources for Cargill, and help the businesses integrate that information into their work processes. In 2016, Anne became the leader of the global Cargill InfoCenter team.

Laura Saunders is Associate Professor at Simmons College Graduate School of Library and Information Science, teaching and conducting research in the areas of reference and instruction, information literacy, and academic libraries. She also has a strong interest in social justice issues related to libraries. Recently, she has been involved in a series of international collaborative studies on topics such as reference competencies and information behaviors. Her articles have appeared in a variety of journals including *College & Research Libraries*, *The Journal of Academic Librarianship*, and *Reference & User Services Quarterly*. She has written two books: *Information Literacy as a Student Learning Outcome: The Perspective of Institutional Accreditation* and *Repositioning Reference: New Methods and New Services for a New Age* co-authored with Lily Rozaklis and Eileen Abels. Laura has a PhD and a Master's of Library and Information Science, both from Simmons College, and a Bachelor of Arts in English Literature from Boston University.

Eva Semertzaki is Head of the Library and Deputy Director of the Centre for Culture, Research, and Documentation at Bank of Greece. She holds a Master's degree in Library and Information Science from Simmons College, Boston, USA, as a recipient of a Fulbright scholarship.

She is the author of the book *Special Libraries as Knowledge Management Centres* by Chandos Publishing, 2011. She is the author of the chapter "Why special libraries are the right places to host a knowledge management centre" in *Knowledge Management in Libraries and Organizations* edited by L. Bultrini, S. McCallum, W. Newman and J. Sempéré, 2016 as IFLA Publications, v.173. She is Chair of IFLA Knowledge Management Section (2017–2019) and a Standing Committee member of the same Section (2013–2017, 2017–2021). She has been the IFLA Knowledge Management Satellite Program chair in Cape Town 2015 and is a co-chair for the IFLA Knowledge Management Satellite Program in Wrocław, Poland in 2017. She was the editor of *Synergasia*, an online library journal published by the Committee for the Support of Libraries in Athens (2006–2015). Since 2005, she is an Editorial Advisory Board member of the journal *The Electronic Library*. Eva is a founding member and a steering committee member of the Central Bank Librarians Group (established in 2003) which organizes biennial workshops in different parts of the world starting in 2009. For the years 2013–2015, she was the chairperson of the annual seminar for central bank librarians organized by Central Banking Events/Incisive Media at Cambridge University, UK. She was co-chair of the 7th ESCB/SSM Information Management Network Meeting in Athens, in 2016. She is a founding member (established in 2013) of the Hellenic Economic Libraries Network (HELIN) which has organized its 1st conference

in March 2015 in Athens, a series of lectures in 2016 and a mixture of lectures and library visits in 2017. She is member of the Greek Host Society for the candidacy of Athens as the hosting city for the IFLA World Library and Information Congress 2019.

She has published articles and has translated books on library topics. She has delivered several lectures in Greece and abroad. Her professional interests include knowledge management, librarians' competencies, e-books, technological developments in libraries, library management systems, history of Greek libraries etc. Member of: International Federation of Library Associations and Institutions (IFLA), American Library Association (ALA), Association of Greek Librarians and Information Scientists (EEBEP).

Gary Shaffer, PhD, is the former CEO of the Tulsa City-County Library a 24 location and 405 employee-strong independent library district and associated 501(c)(3) located in northeastern Oklahoma. He currently serves as the Director of the Library and Information Management Program at the University of Southern California's Marshall School of Business and as Assistant Dean/Director of the USC Libraries' Center for Library Leadership and Management. His book *Creating Sustainable Public Libraries: The Triple Bottom Line Approach* will be available for purchase or checkout in early 2018.

Cindy Shamel, since founding her consulting practice (<http://shamelinfo.com>) in 1998, has adapted to the changing information industry scene by always seeking to assist her clients in making the best business decisions and effectively managing their information landscape. In addition to delivering actionable information through research and analysis, she provides strategic guidance in change management and knowledge audits. Recently, Ms. Shamel has aided clients in developing the business case for increased library staffing, knowledge management services to widely dispersed staff in the hospitality industry, and right-sizing the resources available to the information management function in a prestigious arts institution. With almost 20 years of experience on projects such as these, she has developed a reputation for listening to the stakeholders, distilling the information, and effectively communicating recommended courses of action. Ms. Shamel continues to explore the intersection of knowledge audits with developing the business case. In addition to the work in her consulting practice, she contributed the chapter "Planning for Knowledge Management: Conducting a Knowledge Assessment" to *Knowledge Management Practice in Organizations: The View from Inside*.

Iyanna Sims is currently the head of Bibliographic, Metadata and Discovery Services at North Carolina A&T State University's F.D. Bluford Library. She received her Masters of Library Science from Clark Atlanta University and a Bachelor of Arts in English from Elon University. She has experience in special and academic libraries. Iyanna's professional interests include library

technology, scholarly communication, and a new found passion for recruitment and retention in the field of librarianship.

Niloufer Sohrabji is Associate Professor and Chair of Economics at Simmons College. Dr. Sohrabji received her PhD in Economics from Boston College. Her research has focused on rising financial instability due to globalization in emerging markets and developing countries. Dr. Sohrabji has published various articles on current account sustainability, debt sustainability, foreign investment flows, and exchange rate misalignment in India, Turkey, and countries in sub-Saharan Africa. More recently her research has shifted to global health with a focus on India's pharmaceutical sector. Her current project examines the implications of India's revised patent act that brings the country in line with global intellectual property rights laws.

Laura Soto-Barra leads a team of innovative information professionals in her role as NPR's Chief of Research, Archives & Data Strategy (RAD). Soto-Barra has designed and led the transformation of the NPR libraries into the RAD group, advocating an embedded approach to creating and delivering research services, data analysis, and digital tools to NPR.

As RAD Chief, Soto-Barra has transformed the RAD team to meet NPR's need for digital information and innovation. She is responsible for the continuous evolution of the systems that steward data about all the stories NPR has ever told – and much of the music used in NPR's editorial work. She has led the development of archival products and services for revenues, and as product owner, she has overseen the development of business plans to help maximize the value of NPR data. Over the past decade Soto-Barra and her team, co-managed by RAD Deputy Mary Glendinning, originated and built a robust internal database called Artemis, which has been recognized nationally. Recently, they guided the recoding, restructuring, and integration of Artemis into NPR's core digital workflow systems. Soto-Barra oversaw the creation of the NPR Historical Archive and directs NPR's audio digitization and reformatting project to protect, preserve, and provide online accessibility to more than 100,000 hours of NPR's audio legacy, formerly stored in obsolete physical formats. Soto-Barra's efforts to digitize content and develop strategic plans for protecting and sustaining data has enabled the RAD group to build a world-class, digitally enabled and nimble archive that supports and mirrors NPR's growth as a highly respected media institution. Currently, her team is pioneering efforts in voice-enabled search for NPR. Soto-Barra joined NPR in 2005 as Senior Librarian and became Chief Librarian in 2012. In 2014, she was promoted to RAD Chief, the first to hold that role at NPR. During her tenure, the RAD team has been recognized with numerous major industry awards including the ALA's Library of the Future Award, Dow Jones' Leadership Award, SLA's Rising Stars, and Library Journal's Movers & Shakers. Throughout her career, Soto-Barra's strategic projects have been significant and enduring.

Originally from Chile, she began her career as a chemical and mining engineering librarian at the Universidad de Chile. She and her family later moved to Canada where she earned degrees from the University of Toronto. In 1997, she came to the United States to work for *The Florida Times-Union/Morris newspapers*, which led to an association with the Poynter Institute for Media Studies, and later joined *The Post-Standard/Advance Newspapers*.

Jill Strand is Senior Manager of Library and Knowledge Information Systems for Fish & Richardson, a top intellectual property law firm. Prior to that she was Director of the Knowledge Management Library at Maslon LLP, a Research Librarian at Faegre & Benson, and started a library for a division of Target Corporation in her first job out of library school. Jill earned her MLIS from Dominican University and her BS in Journalism from the Honors Tutorial College at Ohio University. She has been an active member of SLA since 2000, was named an SLA Fellow in 2010, and served on the Board of Directors as President in 2015. Her honors include the SLA Legal Division Career Achievement Award in 2016, SLA Membership Achievement Award in 2013 as well as the Ohio University Honors Tutorial College Outstanding Alumnus Award in 2017.

Cindy Sullivan lives in Boston metro area and graduated from Simmons College with an MSLIS. She managed special libraries for over 30 years at a global investment company and speaks as an evidence-based practitioner. During this time, Cindy hired more than 30 interns and mentored them in the start of their information profession.

Cindy has consulted and developed workshops that she has offered to various Special Library Association events and chapters. Cindy is now moving into her next chapter. She currently serves as a trustee of the Kingston Public Library in Kingston, MA. Recently she accepted a position as the Head of Adult Services for the Osterville Village Library on Cape Cod.

PREFACE

WHY A HANDBOOK NOW?

The advent of relatively easy access to technological devices and the rise of the Internet have changed everything about the role of the information professional – or have they? When S.R. Ranganathan (1931) promulgated his Five Laws of Library Science the quantity and quality of information available in the 21st Century and the technology used to manage and access it were not even a spark on the horizon. Yet these Five Laws continue to be the theoretical and operating principles (however the wording might be updated to reflect modern tools and semantics) to which information professionals remain committed.

1. Books are for use
2. Every reader his (or her) book
3. Every book its reader
4. Save the time of the user
5. The library is a growing organism¹

The tenet arising out of these laws – “the right information, to the right person, at the right time” – is as familiar to special librarians as it is to all types of information professionals. After all, how easy is it to substitute the word “information” for “book” and the phrase “information professional” for “librarian?” The challenge has always been, and continues to be twofold; how to convey this tenet to decision makers who cannot always hear or see its wisdom and how to be as nimble as we must be to enhance and sustain the skill set and expertise we as information professionals have to offer. The danger arises and paralysis sets in when we forget the value of our core skill set and our expertise and do not recognize the opportunities new tools afford us to align this core with the goals of our organization, thus contributing to their (and our own) sustainability.²

Between 1955 and 2001 eight editions of this Handbook were published by Aslib-IMI under various titles, including *Handbook of Special Librarianship and Information Work* and *Handbook of Information Management*; the latter title change intended to recognize “a broader spectrum of managed information services and structures than merely the management of a physical collection of material.”³ It was considered a “flagship” reference work and the “seminal text on modern information theories, procedures and practices.”

This is not a new edition of the previous Handbook. While still aiming to be an integral text for MLS students and a ready-reference for information professional practitioners, it is by no means meant to encompass all modern information theories, procedures, and practices. The variety of settings in which information professionals apply their skills and expertise today makes that a fool's errand. Whether read sequentially or in topical combinations around common themes, the chapters here are meant to provide a construct through which both the student and the practitioner may learn about the major challenges facing them in the early part of the 21st century and also find guidance in how to approach tackling these challenges regardless of the type of organization in which they work.

So why does this matter? It matters because no one can hope to achieve their full potential, personally or professionally, without acquiring the best information they can to inform their choices. Whether pushed out to them or pulled in by them, the average person will, on a daily basis, need some type of data, information, knowledge, or wisdom to help their decision-making processes. It is just all too overwhelming. Some intervention is needed to help enable the best choice; and that's where information professionals become invaluable.

The chapter authors here run the gamut from independent information professionals providing contract services to those with significant experience in public, academic, and special library settings at a variety of levels of responsibility. One is an economist in a business school, others are professors in MLS programs, one or two have had long careers and have taken the opportunity to share their copious experience with the reader, many are practitioners, themselves grappling with many of the topics discussed. We also endeavored for this not to be a U.S.-centric undertaking and believe we have succeeded with authors from several countries.

Finally, we have also included a few short essays from "the bosses." These are non-IS professionals who manage the information service, library, etc. within their organizations. How they value what we contribute should never be far from our thoughts and deeds.

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James M. Matarazzo
Toby Pearlstein
Editors

NOTES

1. Ranganathan (1931).
2. Matarazzo and Pearlstein (2016).
3. Scammell (2001).

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