THE INDUSTRIAL AND COMMERCIAL LIBRARIES GROUP

ICLG News

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Message from Our Chair

Hi, I'm Simon Jones, librarian at Pemberton Greenish, a law firm. I've been around a bit – at the House of Commons Library, BBC, Sports Council, a post production house, a council's social services, a construction firm, a FE college and VSO twice.

I like to think all this means I have plenty in common with other special librarians:

Marketing: we more than any other form of library have to argue for our very existence.

Isolation: few of us work in large libraries and even they will tend not to know many people doing comparable jobs at other organisations.

Classifying – we have to have a handle on our organisation's stock. In most other types of Library there are people doing this full-time who become very expert.

So it's tough!

Stay with me...

What this group can do to make a difference is get people working in special libraries to pool thought. That is what we're for. If you want other people doing similar jobs to let you know what they think and/or you want to sound off your ideas to an audience that shares your working experience then get involved.

Look at the diary, that will give you an idea of what we're doing. A lot of it is getting some of the most exceptional and talented people in our profession, and outside it, to talk about their experiences. We don't pay our speakers nor do we pay for our venues. But we still run top events with a genuine buzz about them.

So come along to a talk. Or, if it's not near you, get in touch and we'll help you network with others nearby.

We also have a limited amount of money to help people particularly those who want to support us at conferences such as *UmbrelLA* or the *Library + Information Show* where we field a significant presence. You'll have to put your shoulder to the wheel but it's a great professional experience and a lot of fun. We can always use sponsorship or helpful suggestions or just a friendly contact. Write an article for the newsletter if you like.

The Committee hopes that as many of you as possible will get involved. This Group is about supporting each other and it truly is as much fun to do things that help out other special librarians as it is cool when someone points you in the right direction and you end up doing something that awes your boss

Be seeing you.

Simon Jones

Meet Your Committee

Douglas Milne **– Newsletter Co-Editor**

My library career so far has taken me to some far flung places, has let me work with and manage lots of disparate bits of information, and has provided me with the opportunity to meet some inspiring people. By 1994 I had completed 3 degrees in the UK, and then paid old Blighty back by jetting off to the USA for 6 years. I worked in New York for the H.W. Wilson Company as an indexer/abstracter in the Business Periodicals department, indexing the contents of a wide variety of business journals, and specialising in telecommunications and computer information. I had a great time there, and got to see a lot of the States. I also worked as a volunteer computer coach at Brooklyn Heights Business Library's Technology Resource Center, helping the public search the Internet, and pressing Ctrl, Alt and Delete when the need arose. On my return to the UK I joined McKinsey & Company's telecom practice, organising its information, and helping McKinsey's consultants with their information requests.

While the sun shines I can be found of a weekend cycling round the leafy lanes of Berkshire and Oxfordshire, and when its gloomy or raining (ie most of the time) I like nothing better than reading some great (and sometimes not so great) literature, and enjoying a pint of real ale. (The real reason I came back!)

The ICLG are a great bunch of people, and I hope to meet lots of other members in the future.

Douglas Milne

<u>Mark Howard</u> **– Newsletter Co-Editor**

Having qualified as an archaeologist, an illogical progression led to a post as assistant librarian at a psychiatric hospital in Oxford. After that the only way was up and I moved into the commercial environment as Customer Services Manager at the fledgling UK office of subscription agent Swets. The world of periodicals, both paper and electronic, has formed much of my career since, having worked also for Faxon and most recently for RoweCom. In between I spent six years working as Marketing Manager for Dialog where I also trained customers on Dialog's arcane search language in some funny places (like Bratislava and Bahrain!). Working for Current Drugs, helping launch their Investigational Drugs Database to information departments in pharmaceutical companies worldwide, also proved invaluable experience.

Being a country boy, weekends find me either down the garden forcing rhubarb or scoffing fairy cakes at local village fetes. I'm a leading authority on volcanoes, especially Krakatau, and when not tackling Hekla, I like nothing better than to relax by playing the bongos.

I've been involved with ICLG on and off since its inception and have edited the newsletter once before. What goes around comes around!

Mark Howard

The Intranet and Knowledge Management

The successful Scottish branch programme continued with a visit to the offices of Scottish Enterprise (SE) in Glasgow to hear Gail Rogers and Karen Perkinton give a very informative presentation on how the SE Intranet and knowledge management strategy had been developed.

Gail explained that the role of Scottish Enterprise, Scottish government's development agency established in 1991, is "to help the people of Scotland create and sustain jobs, prosperity and a high quality of life". The initiative to develop knowledge management systems had resulted from a wish to develop a knowledge sharing culture in order to become a more effective economic development agency. Improvements were sought in services to customers, stronger alliances and partnerships, more innovative projects and programmes, and greater efficiency in delivery.

From the start buy-in, both from the management and from employees, was seen as vital. Managers were asked "Do you want to share knowledge to transform your business?" a question to which it was difficult to give a negative response. One of the benefits of the new system was promoted as the saving of time and money by eliminating the duplication of research by tracking the use of consultants and the projects they were involved in.

Several tactics were used to obtain employee buy-in, including a knowledge sharing competition with considerable rewards. Staff were encouraged to post draft papers on the intranet and get comments on them, thus promoting a two way dialogue.

The KM strategy was implemented by a knowledge leadership group. An action plan was developed, central to which was KWeb, providing the infrastructure required to support SE as a knowledge based organisation. A portfolio of change initiatives was prepared, to be implemented across the business by a cross section of staff and managers. The two work streams for future development are knowledge capability, including the Knowledgebase and sharing best practice, and K-communities in research, evaluation strategy development and economic intelligence.

The wide-ranging question and answer session showed that this had been a stimulating event. Overheads from the talk can be viewed on the ICLG web site.

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Planning your knowledge management system

***David Ogden,** Director of Library & Information Services at international law firm, Sinclair Roche & Temperley, examines the wide range of issues that the information professional needs to consider when tackling the knowledge management (KM) question.*

A library automation system is the essential starting point to make full use of library materials. The technology may need updating to work hand in hand with software purchased for the KM system as a whole.

The intranet will be the focus of information provision throughout the firm - it should closely support the firm's overall business strategy.

It will include the library catalogue and internal publications including a searchable archive. The Human Resources manual, Marketing news and the Library Bulletin for example would be solely on the system and not exist in hard copy. We should seek to abandon the mountains of paper on our desks.

The home page headline could be "Welcome to the Information database" - the database offering legal information and work product sharing internet repository for XYZ staff. The home page would list a what's new page, listing recent additions to the know how system and also a legal news page kept up to date by library staff. Links would take the user to the practice areas, regional offices, organisation (eg mission statement), Marketing, IT, HR and the virtual library. Links take the user to the required page. Client pages are another aspect with full contact details and links to their web sites - also case management, billing information, time recording etc. Searching functionality using a thesaurus and site index are essential. Searching external sources on the net using a web crawler would also be available.

Each department throughout the firm would have its own net pages including for example

staff details followed by the department news and developments and minutes of meetings. A communications headline could include, for example, minutes of meetings and requests for assistance. The document library could include model documents, for example, the Companies Act. The best practice area might cover joint venture and corporate governance materials.

A KM system containing best examples of the firm's know how is essential. Letters of advice, memo's and agreements are the main building blocks of such a collection of knowledge. Other information sources would be precedents, forms, counsel's opinions, recommended experts and contacts at overseas firms.

Partners with some interest in the project should be appointed as information partner for their practice area. They can encourage their staff to provide the top quality know how available in offices but not at present accessible firm wide. Support from the Managing Partner and Heads of Department is crucial for the project to succeed. Encourage volunteers to get involved. Give them areas of responsibility and something that interests them.

We need to adopt a sharing culture with regard to information and know how. Ignore the laggards and sceptics. Hopefully they will come round when they see the benefit of the system. The project will be small scale and I would suggest initially concentrating on one department. See how it goes and learn from mistakes. The problem is often not an unwillingness to donate documents but rather a lack of appreciation by colleagues of the value of the documents. Offer a prize for the best contribution each month! As time goes by, lawyers will see the names of colleagues appearing as authors of documents whose work is worthy of inclusion and will become authorities in their subject. The more useful lawyers find the system the more documents they will contribute. Prior to lawyers' appraisals, consult with information partners as to who has contributed the best quality documents to the system. Lawyers must feel that it is their system and should be empowered to load documents on the system.

We must avoid information overload. We don't want a hundred examples of one type of ship mortgage. We also don't want hundreds of items put on the system for the sake of it. Quality is the key. Is it a document which will assist your colleagues? A quality control system needs to be part of the process. Sell by dates should be attached to each document at which point the submitter can review the document to see if it still has currency. An editorial group could meet monthly and analyse the direction and usefulness of the system.

Documents can either be scanned into the system or merely indexed with abstracts on the net. A link could take you to WP documents. Each document contributed needs to be classified under several categories and ideally an abstract attached. The following details should be requested when a document is submitted. Document properties should include Name and author and date submitted, title, abstract, date written, system ID number, sell by date, keywords, legal jurisdiction, comments. A powerful search tool scanning ever word in the document or title may be useful in certain situations but will still produce large numbers of documents irrelevant to the needs of the searcher. This is why keywords selected from the thesaurus are vital. As for putting documents onto the system, the submitter should include the file name if contributing an electronic document. If it is a manual document, it should be scanned for users to download, and enable them to cut and paste the attached document to email. Lawyers need speedy access to relevant documents in an organised fashion. A simple search could include the number, keywords and author using a drop down menu. Advanced search would include boolean logic and connectors.

Most users won't care whether useful information is internal or external. The library can create a virtual law library on the intranet. An extensive collection of links can take the user straight to all the useful web sites, some of which we subscribe to and others that are free. I know the web crawler technology can scour the net for any mention of the info required and this can be very useful. However when time is at a premium I prefer to use certain web sites I know will be useful. For example I rarely use search engines such as Yahoo when net searching. It is much wiser to use legal portals such as the Delia Venables or Sarah Carter Lawlinks sites.

Many legal journals will only appear in internet format in future - these will either be free or chargeable with a password. Fairplay's daily news by email for example is arguably more useful than the weekly journal. Their web site offers a free searchable archive of news from the service. Links can also go to fun sites eg the cricket score, recipe of the day. Staff are going to look at these web sites. Why not eradicate their time searching for such information?

Articles on the site need to be dated, and continually updated , every three months at least.

Web searching will rapidly become the first port of call for potential clients, to quote Richard Susskind. In the future clients will expect access to the firms know-how via an extranet and the system must be designed with the client in mind. A lot of basic advice will be available for free or for a fixed subscription on the website. Lawyers will use the internet to advise clients more and more.

Many lawyers think that only conveyancing , probate sort of work will be transformed by e-commerce. Look at the Freeserve Desktop Lawyer website for this sort of thing. Don't assume, however that your area of specialisation is not going to be affected by the e-commerce revolution! Lawyers will have to come up with innovative methods of working and charging for their work. Hourly rate charging has a limited lifespan.

A firm's law school could be made available on the extranet. Basic legal information can be made available on the range of practice areas that the firm specialises in with interactive test questions perhaps. Such advice needs to be punchy and jargon free.

Finally, the whole project should not be driven by the IT department despite its major involvement. It is the content and quality that is crucial and the project must be directed by the lawyers.

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Networking – Presentations and Group Discussion

On 25th April 2001 an ICLG organised evening on the theme of 'Networking' was held at the LA HQ. Paul Pedley (of Economist Intelligence Unit) opening the proceedings by welcoming us, setting the scene and then introducing the first presentation…

Principles And Practice Of Networking, Including Consequences Of Not Doing So

Graham Coult, Editor of Managing Information and visiting lecturer in Information Policy (MA Dissertations) at the University of North London.

We all have aims and objectives, keep these in mind when working they help to maintain focus - Networking is no exception. What is a Network? "…A group or system of interconnecting people or things…" (OED).

Networking can encompass a multitude of activities and encompasses far more than just formal groups - though networking does not include gossip. It can encompass many types of groups including electronic discussion lists and E-mail. It can be

formal or informal - it can occur at work; at your desk; in the canteen; in the pub etc.

Networks are valuable! Lists of names are often sold to businesses because they are commercially exploitable.

Some people are very good at networking, whilst others are not so good but we can all still do it!

Where and how you network can add value both professionally and personally, through…

- *Professional contacts*
- *Friends*
- *Information sources*

You can gain from giving as well as taking, e.g. through professional groups activities, seminars, workshops.

Solo's are not excluded they can network too, both in and outside the workplace...

Join in activities at work

In the canteen

In the works social club

If nothing is happening, then why not start something.

Shyness can be a problem, but don't be too hard on yourself. Do think about your achievements (but don't necessarily talk about them), be interested in others.

Non face-to-face networks are also important, e.g. e-mail discussion lists. Ensure you are approachable and use humour, but don't encourage litigation!

The conseqences of NOT networking should also be considered!

Vital info can very easily be lost, e.g. Information about business services that are not performing or about great job opportunities etc. are freely communicated via networks. You can only build these important networks through networking.

Remember - all the above can be gained from actively networking at work and with other professional activities.

Wider Aspects Of Networking - Community, Political Etc.

Simon Jones Chair of ICLG

Networking is a skill we all use, to a greater or lesser extent, all the time. It is an invaluable skill and should be developed because it can help you improve the quality of your life both your personal and professional capacities.

Networking develops communication skills, which are invaluable. It helps improve good talking and listening abilities, it also helps to develop the ability to think things through – these are all excellent networking skills.

Networking is great skill to have in a family crises, it can help resolve difficult situations.

Librarianly skills (we've all got them on our CV's) use them to your advantage, to help you achieve your goals.

People tend to turn toward professional stereotypes, some familiar ones are that; Teachers – can be bossy; Policemen – can be effective with just a look; Firemen – the strong & silent type; And of course 'Librarians' are always helpful and intelligent. The point is we've got inherent traits, use them in your everyday lives. Build on your traits, Intelligence, Caring.

Care about what you do and tell people about it if they are interested. Talk to people about what you do at work, they will gain a better understanding of what you do and therefore you have networked.

Networking is a means of promoting your skills, the rewards are that other people will believe you do a worthwhile and important job. They will come to you for help, make you feel that you are doing a worthwhile and important job!

One specific thing you can do is to take an interest in the professional associations of your user group.

And One warning: don't discuss copyright law on a hot date!

Networking Within The Organisation

Kate Sanders of British Institute of Radiology & Dawn Pearsons of Olswang.

Ensure that the library is as central as possible. The advantage is that it makes it accessible which helps to make sure that the library & staff has good relations with the other departments.

The disadvantage is that you will have to make an effort to network.

All new staff should have an induction, ensure that staff know that you are there if they need assistance (even for something as straightforward as the A-Z).

Try to tailor inductions to the individual, this encourages people to see what is available that is relevant to them and encourages library use.

First impressions count and it is important to be professional but also approachable. Ensure that you help staff whenever they ask and that staff know that when needed you will assist.

Networking is even more important when you work on your own within an organization. You need to let others know that you are there and remind them of what you do from time to time. Get out and about in the company - Greet & Meet – Walk & Talk.

What is networking (at work)? It is interacting with everybody within your organization.

Where can you network?

Informally, over the coffee/tea kettle.

Formally, in your professional capacity

Network within the membership of organisations you are a member of (employed and voluntary). Encourage others to join-in, find out what those people do and what can you do for them.

Network at meetings within your organization, at Library and Industry Committees and at steering groups etc.

Share experiences: for example circulate information about courses attended, email is useful for this - whether or not you have an intranet - and don't forget the personal touch.

Social events outside work: always do your best to attend, why miss the opportunity to network and enjoy yourself.

Occasional lunchtime or evening drink in the local pub: it is amazing what you find out – not only moans but the unvoiced needs that people have.

At the your company's annual conference: try working together to promote the organization with those you don't usually work with and in a different environment.

Networking can be an opportunity to market yourself: the more you can do for your customers, the more you are encouraging re-use – re –use is a form of networking.
Network…

In person

Via promotional literature

At social events (make the effort to get involved).

Make sure people know you.

At staff do's

After a couple of drinks people are likely to be more candid, you can find out what people need and really think

REMEMBER WHEN YOU NETWORK YOU ARE ALSO PROMOTING YOURSELF

Networking Within The Profession

Lyndsay Rees-Jones of the Library Association.

Librarians are great givers. This is important, it is an essential networking skill.

Networking is possible in all sorts of places…

- At work: with other members of staff, with other departments, with other offices.
- Within the profession – locally, nationally, internationally.
- Networking with other professional groups that are relevant to the work you do is important…
- Professional bodies relevant to your company's arena of business
- Professional library groups external to your place of employment
- At social clubs (Golf ..fishing, etc)
- At your children's school

What should professional bodies be doing for their members?

The professional organisation can't go to every individual and provide a tailore-made service for every individual, but every individual can go to their professional organisation(s) and communicate what they want/desire. Network with your own professional bodies as well.

Sign-up for any campaigns that are being organised that relate to you, they can help you. e.g. Networking within the profession, as opposed to organisations employed within the profession.

Networking gives you..

- Better kudos
- More rewards
- Develops interests
- Makes you more marketable

The easiest way to network? Make sure you have a business card and always keep some with you.

Power Networking

Donna Fisher and Sandy Vilas.

Networking is the process of gathering, collecting, and distributing information for the mutual benefit of you and the people in your network.

Why network?

A referral generates 80% more results than a cold call

approximately 70% of all jobs are found through networking

most people you meet have at least 250 contacts

anyone you want to meet or contact is only four or five people away from you

Networking is not:

Selling

Using people strictly for gain

Coercing or manipulating someone to do what you want

Putting friends, neighbours, or associates on the spot

Badgering people about your business.

General Points Of Note…

Can you network too much? Yes if it becomes counterproductive, putting people off - people trying to avoid you e.g. do enough but don't be too pushy.

You need to get the job done, so be objective, some situations require more networking than others.

You will get far more out than you have to put in.

Networking can effect cultural change, use this to your advantage.

At work, reception staff are the 1st point of contact in the organisation (for everyone), they are important people to network with.

'Careers can be made or broken depending on how successful we are in this essential area'

Competitive Aware or Competitive Intelligent?

This ICLG meeting took place in the grand surroundings of Farrer's law firm, and concerned competitive intelligence. The speaker was *Chris West*, Managing Director of Marketing Intelligence Services, who gave a lively account of competitive intelligence's past present and future.

CI: What it is and what it's not.

Chris defined competitive intelligence as the process by which a company gathers information about its competitors, which it then hopes to use for competitive advantage. He made a clear distinction between competitive intelligence and industrial espionage. CI is concerned with legally obtaining information about companies that is often in the public domain, whereas industrial espionage is characterised by such illegal activities as theft and trespass.

<u>Born in the USA</u>

Chris told of competitive intelligence's birth in the USA, which remains its biggest market. However competitive intelligence is becoming more of a force in the UK. The reasons for this growth in the UK, and indeed much of the world, is that there has been a fundamental shift in focus within companies from the customer to the competitor. In the past competition between companies was a gentlemanly affair: a company knew what its competitors were up to, and wasn't too concerned about this, as its focus was on pleasing its customers. However, in modern times, a number of factors have compelled companies to grow and steal market share from their competitors.

These include:

- Privatisation
- Deregulation
- Globalisation
- Recession
- Reductions in product and service differentiation

All these factors have led to cutthroat competition between companies and consequently a greater need for competitive intelligence.

Where they've come from, where they are now, where they're going

To gather effective competitive intelligence on a company's rivals, a CI professional will need to know about a competitors' past, present and future. The past is useful to study to see how the company has evolved and to look at what kind of culture has become established within the company. The present is useful to study when examining a company's current tactics. The sort of things a CI professional looks at will include a competitors'

- R&D
- Customers
- Marketing
- Advertising
- Prices
- Personnel
- Acquisitions and mergers
- Equipment
- Patents
- Purchases
- Appointments
- Processes

The future is speculated on to try and guess where a company is heading. Among the factors that need to be studied to make an accurate prediction about the future are:

The strategic intent of a competitor

New products entering a market

New markets

New alliances

New market entrants

New marketing initiatives

Chris made it clear that the future is the most interesting area for a CI professional to study, and not surprisingly the most difficult one to make accurate conclusions about.

Characteristics of a CI professional

For a CI professional to be successful they must be persuasive, persistent and able to handle rejection. Above all they must be resourceful at ways of finding out information about a company. Either way Chris helped to dispel the image of people working in the CI business as shady characters who wear trench coats and dark glasses and carry miniature cameras. CI professionals are as likely to have come from market research firms as the intelligence services.

We have ways of making you talk: the CI approach

CI professionals often find out information about competitors that is readily available. They make extensive use of market research reports and benchmarking companies. However, often they have to dig for information that is not in the public domain. To build up a picture of a competitor they often try to get it to reveal something about itself. Chris suggested one way this could be achieved - to find out about company A ask about company B. Trade shows are a great place for these kinds of tactics, and a company's salesmen can also employ them. A code of ethics governs the CI profession and CI professionals aim to not misrepresent themselves, but other than that anything (legally) goes in the search for information.

Librarians and the CI world

Librarians can have contact with CI professionals, who can utilize a librarian's expert knowledge of sources when tracking down a piece of information. Librarians can also make excellent CI professionals themselves, as they often conduct research and weigh up the value of different pieces of information. As veterans of reference interviews they also know how to ask direct questions, although maybe a degree of, shall we say, obtuseness may be more valuable when asking questions in the CI world. Our training may be at odds with the approach employed by CI professionals, and it is this fact that led some of the audience to state that they were too 'honest' for CI work.

Who uses CI?

Just about any company that has competitors has a need for competitive intelligence, but some sectors are heavier users than others. Law firms and pharmaceutical companies have a great need for CI: law firms have a need because of the greatly increased competition in their sector, and drugs companies need it because if they have invest £10 billion to develop a new drug, they need to know that their competitors are not going to release a similar drug a year earlier.

Making CI a success

For CI to be a success there has to be a cycle of activity that matches the flow of intelligence to the needs of the company and the changes in the environment. There has to be an active CI department that assesses CI needs on a regular basis: the department determines CI needs through discussion with management, sources the intelligence, and feeds it back to users. The CI team will then consult management on what should be done next. The rate of the flow within the cycle will expand or contract according to the level of activity within and outside the company, but it should never cease. Without this type of set-up CI is a waste of time and money.

The future of CI

The increasing level of competition amongst companies will ensure that competitive intelligence will increase in the future. The demands on it will increase too. There will be a thirst for reliable information, rather than the hunches and anecdotal evidence relied on in the past. The ability to obtain that reliable information will become more difficult too, as companies start to employ sophisticated counter-intelligence efforts aimed at blocking outsiders from finding out sensitive information about their companies. Both these factors will lead to an ever-greater requirement for CI professionals with high-level analytical skills. But the future looks bright, and I would like to thank Chris on behalf of the ICLG for an illuminating talk on an often-misunderstood area.

Douglas Milne

Fundraising for Librarians

On the 4th April a joint SLIL/ICLG event was held at the Rising Sun Pub in London EC1. The very knowledgeable special guest speaker Kathy Roddy gave a comprehensive insight into fundraising for librarians. The evening was a resounding success, with much lively discussion and many very positive comments made about how informative it had been.

The following topics were covered:

- Libraries in the changing funding climate
- Identifying and packaging fundable projects
- Researching potential sources of funding for libraries
- Some key library funders (including HLF)
- Making a case for support - what funders are looking for
- Budgeting issues and why they are so important
- Building relationships and looking after donors

Introduction

It is becoming increasingly important for librarians to have some awareness about the fund raising environment because they increasingly have to rely on external sources of funds. Fundraising is an area of work about which there is a great deal of misunderstanding with the frequent misconception that fundraising is about asking for money. That is the easy bit – its getting to the point of feeling confident enough to go ahead and ask that is difficult.

Stage 1: Business Plan

Most organisations that are considering fundraising will have a specific purpose or goal in mind for any funds that are successfully raised. Most donating organisations want to be sure that the fundraisers purpose fits in with their own organisation's overall strategy, that the organisation is viable in the longer term. To this end a business plan is required, preferably constructed with fund raising in mind.

The Business plan needs to accommodate seven elements…

1) Mission / vision
2) Background information
3) SWOT analysis
4) Aims and objectives
5) Projects
6) Costs and timescales
7) Infrastructure to support the plan

Stage 2: Projects

The plan will be structured and costed on a "project basis" or, for capital projects, a "shopping list" of items that are needed will have to be constructed.

The importance of this "project" approach cannot be overstated – because as a part of the exercise core costs will need to be apportioned across the various projects that are being run. It is extremely difficult to get funding for core costs (e.g. electricity, telephone, rent, sometimes staff costs). Funders much prefer to fund "projects" because these are more tangible, they have measurable outcomes.

Depending upon the project, it can also be useful to draft a "case for support" and have others comment upon it. A case for support outlines what the project is, why it is important, who benefits from it and why the reader should support it. This document can then be used as a basis for constructing grant applications (see below).

Stage 3: Fundraising strategy

After the amount of money that is needed has been identified, the next stage involves thinking about where that money is going to come from. For many libraries, as a department embedded within a larger organisation, a proportion is going to come from internal sources as part of the organisation's overall budget.

The development of a fundraising strategy will be influenced by past funding patterns, which may include any of the following…

- Internal funding (from parent organisation)
- Statutory funding (via local authority or central government department)
- Lottery funding (e.g. Heritage Lottery Fund, New Opportunities Fund)
- British Library grants
- Trusts
- Companies
- Individuals

Through looking at what funding you are likely to get you will usually be able to identify a "funding gap". The fundraising strategy provides a plan for how that gap is to be closed.

You are also going to need other documents: Funders often request equal opportunities policy, annual report / accounts, organisational budgets, organisational plan, (for staff costs, a job description, person specification etc). It is the getting together of this information that is the "hard" bit of fundraising!

Stage 4: Researching funders

As librarians, we are well placed to undertake research into potential funders, be they organisations or individuals. Use those skills to your advantage.

Focusing on Trusts, you need to draw up 3 lists…

- Geographical area
- Field of interest / type of beneficiary
- Type of grant

Geographical area is self-explanatory: some Trusts will fund national organisations, others will only fund organisations local to them.

Type / beneficiary needs more careful thought. It may be helpful to use an index such as the one in *The directory of grant making trusts*. Examples…

- Libraries and museums
- Literacy
- Literature
- IT training
- Information technology and computers
- Education
- Cultural heritage
- Research institutes

Under type of grant you will identify whether you need…

- Capital / building costs
- Running costs
- Salary costs
- Project funding
- Funding for a feasibility study

Stage 5: Recording information about funders

Design a database to record the information. The really important fields that need to be included are…

- Name
- Address
- Telephone number
- What the Trust funds (geographically, area of interest/beneficiary, type of grant – 3 separate fields)

- Name of every single Trustee
- Meeting dates
- Average grant
- Highest grant
- Whether they have funded your organisation before (easier to get more money out of existing funders rather than money from "cold" targets
- Notes

Stage 6: Making the approach

Most important – does anybody in your organisation know any of the Trustees of a grant-making Trust? Personal contact is the easiest way to get money from a Trust. It can be the only way in to Trusts which "do not welcome unsolicited applications".

Telephone the Trust and talk to the administrator about what you want to apply for. Explain…

- Who you are
- What your project is
- How much you need over how long a period
- Why you think the Trust may be interested in supporting it
- Who else is supporting the project

Ask…

- Is this an appropriate project?
- How might it be amended to become more eligible?
- Does the Trust consider grants of the size requested?
- What is the application procedure and deadlines?
- What supporting information will the Trust
- require?
- Would a visit to the library / organisation be appropriate?

Fundraising is all about building relationships with people, so even if someone in your organisation knows a Trustee of a grant making Trust, always keep the Administrator informed. You can also seek advice whilst you are completing the form / drafting the letter.

Some tips for making applications…

- Read the guidance notes carefully
- Be succinct – try to fit the answer into the space
- provided
- Answer the question
- Answer all the questions
- Be honest – especially about any other funders you have approached – Trusts "talk" to each other!
- Make sure you include additional information requested
- Do not include information which is not requested
- On letters, make sure you "top and tail" them by hand

Stage 7: Follow up

Regardless of whether your grant application is successful or not, you have initiated a relationship and this needs to be developed.

If successful…

- Always have a senior person in your organisation telephone to say thank you
- Follow up with a letter of thanks
- Add the donor to the mailing list so they are kept informed about what you are doing
- Always abide by any monitoring and evaluation you are asked to carry out
- Invite the donor to visit your organisation (at some stage)

If unsuccessful…

- Telephone to find out why and record this information on your database
- Find out if / when you could apply again
- Write to thank them for considering your application
- Send them your next Annual Report (if you intend to approach them again) and let them know what the organisation has been doing

To Summarise:

- Construct a business plan
- Identify projects
- Cost the projects and apportion overheads
- Fundraising strategy
- Prepare / gather other relevant documents
- Researching funders
- Record information about funders
- Make the approach
- Initiate follow-up procedures

Kathy Roddy has been involved in the not-for-profit and statutory sector for nearly 15 years, with a background as a librarian in the public, academic, and specialist sectors. Her work now covers a wide variety of fields fundraising and related fields. Kathy Can be contacted at

kathy@kroddy.fsnet.co.uk

Visit to the Institution of Civil Engineers

One sunny summer's evening I had the good fortune, as part of an ICLG delegation to visit the Institution of Civil Engineers (or ICE for short). The visitors came from as far afield as Reading and Milton Keynes and from backgrounds including legal, media and the BSI.

This is the world's oldest engineering organisation with the largest collection of engineering material in the UK, and contained an extensive back catalogue of authentic material, including handwritten notes by Thomas Telford and a number of other eminent engineers.

The tour group was split into two sections and we were kindly given a tour of the library and its various chambers by resident librarian, the omnipresent Mike Chrimes. We were treated to a brief history of the organisation which was set up in 1819. We then went upstairs to the official and government publications room.

At first glance the establishment appeared to live up to the traditional image of what a library should look like – shelves upon shelves of dusty bound volumes – but there was much more to it than this.

Walking into the archives department containing pre-1900 material was like entering a different world as the temperature took a sudden drop and summer seemed to become winter! At this point I realised why they call themselves ICE!

This room housed an impressive collection of mostly original papers on bridges, railways, roads and other aspects of the profession from various corners of the globe, including a book dating from 1476, which had been remarkably well preserved.

However the highlight of the evening was yet to come. The visitors were shown the progress of the library's digitisation project and the gradual transition from a physical to a virtual library became apparent. Seeing the quality of 100-year old material that had been scanned into cyberspace, served as a reminder of the wondrous things modern technology can do to preserve the memory of human endeavour and was a sight to behold. It seems that the staff have their work cut out with the tall order of converting material from 1836 to the present day into electronic format and I wish them the best of luck!

We were also shown a demonstration of the library's website, which is very well laid out and has very comprehensive search engine facilities. It can be assessed at www.ice.org.uk

We then wound up the evening by adjourning to the pub and discussing the finer points of maintaining a civil engineering library of course.

Ciaran Ward

Tasini Verdict Has Knock-On Effect

On 27th June America's supreme court found in favour of freelance journalist Jonathan Tasini and against the *New York Times*, ProQuest (UMI) and Lexis/Nexis (Reed International).

Mr Tasini and his colleagues at the National Writers Union considered unfair the resale, via electronic media, of articles they had written for paper publication. Under the terms of their contracts with the original publications no mention had been made of such resale via portals, hosts and CD-ROMs. They were not benefiting from these ongoing revenue streams and the court agreed that they should be.

This ruling has a mainly retrospective effect and the *New York Times* has already started to pull older articles archived electronically from some of its distribution databases. Most contracts signed recently have catered for electronic redistribution, but even some of those will have to have their terms scrutinised and, possibly, renegotiated in light of the ruling.

In the main, it is news articles written by journalists for papers and news magazines that are at the centre of this case. Academic literature is less likely to be affected as the copyright generally resides more obviously with the publisher. Nevertheless, libraries may find that some holes appear in their electronic news sources and ultimately price rises can be expected as journalists are fully compensated.

Websites and portals seem inclined to remove articles that may now contravene the judgment rather than attempt to renegotiate terms for the ongoing distribution of archived data. However, there are almost certainly some authors who would prefer their articles to remain available even though they are not being remunerated and the *New York Times* is collecting names from authors who want their work restored!

Other aggregators and distributors have been watching the case with interest. Gale will wait to hear from publishers but it fears "there may be a major purging of articles". Dialog would find it difficult to remove individual articles, and would certainly have to wait until the next update or possibly the next reload.

Michael Jacobs, General Counsel for Lexis/Nexis commented, "At least the decision is unambiguous. We now know what the law is."

Mark Howard

News From Scotland

Jennifer Loudon has moved from drug company Scotia to take up a new position at Perth College. This move to an academic environment has caused Jennifer to question the validity of continuing as Chair of Scottish ICLG and she has decided to resign. She will maintain links with the group in a more passive role and, until a new Chair is appointed, Celia Hukins (celia.hukins@scotent.co.uk) will be the point of contact. We wish Jennifer well in her new role.

Diary…

6 July (Fri) 9:30 – 10:45 UmbrelLA Session 2. *Setting Up the Virtual Library*, Kate Arnold, Content Manager, National Grid for Learning, Becta. UMIST, Manchester.

6 July (Fri) 11:30 – 12:45 UmbrelLA Session 3. *The Bookless Library: Can We Manage Without Paper?* David Alsmeyer, Information Services Manager, British Telecom. UMIST Manchester.

6 July (Fri) 14:30 – 15:45 UmbrelLA Session 4. *Copyright and Security Issues in the Virtual Environment*, Charles Oppenheim, Professor of Information Science, Loughborough University. UMIST Manchester.

7 July (Sat) 9:30 – 10:45 UmbrelLA Session 5. *Negotiating Contract for the Virtual Library: How to Get the Best Deal from Your Suppliers*, Penny Leach, Head of Business Information Services, Goldman Sachs. UMIST Manchester.

7 July (Sat) 11:30 – 12:15 UmbrelLA Session 6. *Users of the Virtual Library: A Panel Debate*, Patrick Ryan, Chief Librarian, Dept for Employment and Education and Kate Sanders, Library & Information Services Manager, British Institute of Radiology.

25 July (Wed) 16:00 *Visit to London Business School Library*. Tour of the facilities and demonstration of services. Contact Dawn Pearson dmp@olswang.com or tel: 020 7208 8608

5 September (Wed) *Workplace learning in the corporate and small business sectors*, Brenda Nesbitt, BAE Systems and Frances Sibbett, Wellpark Business Centre. Scottish LA Branch/Group Day 2001, Paisley University Library. Contact Celia Hukins celia.hukins@scotent.co.uk, tel: 01224 252121.

18 September (Tue) 18:00 *E-journals: Problems and Solutions*. Melvin Morbey, E-journals Coordinator, Reading University. Clarks Solicitors, Great Western House (opp Station), Reading (for a map go to www.clarks-solicitors.co.uk/wherex.htm). Melvin will show examples and discuss the current situation concerning electronic journals, about licensing, registration, ways of making them available, difficulties of managing them and ensuring access and use both in the workplace and outside. Refreshments will be available after the meeting to allow for informal discussion. Numbers are limited so please register in advance (preferably by email): Claire McWilliam clairemcwilliam@clarks-solicitors.co.uk or 0118 960 4695

20 September (Thu) 16:00 – 18:30 *Networking wine and cheese event.* Wellpark Business Centre, 120 Sidney Street, Glasgow. Contact Celia Hukins celia.hukins@scotent.co.uk, tel: 01224 252121.

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