Enterprise Knowledge Requires Professional Stewardship
by Lynda Moulton for LMD, SLA

Dave Shumaker has been a participant in meetings of the Boston Knowledge Management Forum (Boston KM Forum) when he is working out of MITRE's Bedford office. Seeing the collegial and highly interactive sessions with participants from numerous disciplines as diverse as library and information science, communications, information technology, training, organization development, and business management, Dave thought that the thrust of the group's programming might make a good article for the LMD newsletter. When he asked me to contribute some thoughts on knowledge management relating to the special library professional, I decided to offer a summary that reflects themes of our meetings with commentary on where librarian information professionals are making a solid contribution.

First, I'd like to share a bit about Boston KM Forum, lead by our President Larry Chait. Larry, one of the founders of the group, is a former VP and CKO for Arthur D. Little (ADL) where he instituted a number of far-reaching program to facilitate knowledge sharing and collaboration in the highly diversified, international consulting firm. In fact, the well regarded ADL library reported to Larry, a business change management expert. So, from its earliest beginnings, Boston KM Forum had a library connection. You can learn more about the group by visiting www.kmforum.org and get a sense of its meetings by checking out the Archives link.

We are an email list organization without membership, dues, or specific criteria for participating. With a current mailing list of nearly 500 (plus another 200 without a current email address on file), the group has grown rapidly over the past five years through word of mouth, local business calendar listings and other professional group exposure. We also enjoy the support of Bentley College's business management program where we hold quarterly, full-day meetings.

Each month we have a two-hour (late afternoon) meeting with a featured speaker, hosted by a local company, Jarg Corporation, developers of semantic search technology. About ten to 20 people attend these meetings, half being regular participants. Also, the first Friday of every month we have a breakfast meeting, *KM Topics with Breakfast*, which always brings new and sometimes unexpected ideas to the table as we launch into the topic decided at the previous meeting. It is always interesting because the people who originate an idea at one meeting are often not present when we actually conduct the discussion. This gives participants a chance to interact in a manner similar to what they might experience in their own companies, with all the diverse perspectives that can come from different professions. Breakfasts normally draw 8 to 15 people.

Where does KM intersect with special libraries?

I have been a member of SLA since 1973 when I joined as a student in Connecticut. Having been active in the Cleveland and Boston Chapters since, I have always tried to find ways to make special librarianship relevant to the business environments in which

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many of our members serve. Encouraging members to take activist and leadership roles in their organizations has been a theme in many of my presentations and writing for members. Sometimes the message has been challenged by members who wish to preserve a more traditional view of the profession. My involvement in the knowledge management community is a way to expand my connection to others who have as much of a business interest in making knowledge work for their organizations as special librarians. It is also a way to share with a broader community the competencies we bring to the larger effort. Integrating with the entire business operation of an organization is the best way to ensure that our competencies are relevant and acknowledged; it is not evident to many in the business world what we can bring to the information management arena.

If you consider the foundation of library and information science that formed the basis for my graduate education (over 30 years ago), it was divided into three distinct disciplines that correlate to a more generalize business model today. Here is how that foundation breaks down:

- <u>Collection development</u> that emphasized the scope of content, published and unpublished (internal) that would constitute a body of literature to support the work of our constituents. This required knowledge of publishing, scholarly societies, news sources, government agencies and their publications, the fundamentals of business operations and where, within the operation, valuable internal material is likely to originate. To be effective today, <u>content management</u> initiatives must cover a similar scope plus the enormous expansion of media types that content encompasses. No other professional discipline is trained in the scope of content and media as librarians are.
- <u>Cataloging, classification and indexing</u> were requisite components that addressed the issues of thesaurus/subject headings, controlled vocabularies, automated indexing methods (e.g. B-tree indexes, notched punch cards), bibliography, and broader philosophical models for organizing collections (e.g. Colon classification, faceted classification). Currently, technologies abound that automatically categorize, index and extract metadata. <u>Content management systems</u> (CMS), <u>Document Management Systems</u>, and <u>Auto-categorizing</u> engines contribute some tools that can aid with the more structured approaches. However, they all depend on information science expertise to bring quality and discipline to the indexing process that characterized human (original) cataloging and indexing practices in the past. It is increasingly common for members of our profession to play a role in developing and implementing the systems in this market.
- <u>Research and retrieval</u> were the broad activities for the services librarians brought to our constituents for elevating collections to a point of usefulness in the workplace. Using our investigative methodologies and retrieval techniques to navigate and mine content from a myriad of disparate indexes and catalogs, we delivered the resources our constituents needed to get work done. <u>Search technologies</u> have invaded every aspect of 21st century workers domains, migrating from integrated library systems, to embedded search in virtually every software application, to the Internet free search engines. Paid search has been eclipsed in visibility by numerous free search options. However, it is important

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for us to educate and remind the consumers of content that much of the really valuable content is still invisible without subscriptions to value-added and peer reviewed materials. As searchers we still excel at discovery and retrieval, and our competency in evaluating content and establishing relevance is better than any rule-based system now in commercial deployment. We can contribute to building better automated systems and implementing the ones that already exist.

Knowledge management is currently focused on managing knowledge assets. This includes building infrastructures for expertise locators, content capture and organizational models, categorization and retrieval. All of these correspond to methods and practices long part of information science disciplines. In our roles related to reference and search we also have been in a position to know who is doing what and for what purpose. Tangentially, we have played a key role building networks of experts and expertise in our organizations, one of the most unique aspects of special librarianship.

Dramatic and rapid change in companies and the need for more flexible infrastructures that manage knowledge assets are key differentiators from our past. Now, we need to play a strong role in designs that adapt to new technologies, evolving business models, re-worked organizational structures, mergers and acquisitions that must absorb and divest knowledge assets at a rapid pace.

Roles for library and information science professionals

The library management division has historically been populated by those who are in or aspired to leadership roles in their professional work. Leadership can be achieved in many areas of knowledge management, as I have learned from the examples that showcase themselves at our semi-monthly meetings. Here are some of the ideas that these examples have inspired:

- Knowledge Agents who work within specialized business units in an organization, bringing expertise in subject disciplines aligned with the business unit, and information science methods to the management of the group's assets.
- Advocates for Knowledge initiatives need to be tuned in to aspects of an enterprise in which a significant amount of knowledge is being generated. Advocates can bring observations about the value of the resources being generated, and their potential value to management by making inquiries of key employees about their ability to find and re-use the content in their own work. A variety of discovery techniques (interviews, surveys, or spot visits to knowledge leaders) can garner insights into what knowledge workers need in order to make better use of what already exists.
- Catalysts are also needed to provoke change in the status quo, often a perpetuation of practices that allow valuable content to accumulate on individual desktops without being elevated to a publishing model where others can benefit from the resources. By identifying some "hot" knowledge properties that would benefit key workers (e.g. highly compensated search scientists or engineers) and making them accessible through search for others to use. Being willing to vocalize observations

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about what is needed and being willing to manage the project to bring content out of obscurity will establish you as a leader.

- Overseers seek and accept responsibility for a domain. Saying that you would like to manage a collection of information that you feel is vital to an organization's success and survival is a positive for most overwhelmed "caretakers." Then it is up to you to bring it alive for others to see and use through a Web site or portal destination.
- Guardians of knowledge assets identify, not only the obvious content, but also the fundamental building blocks of corporate, scientific, technical and analytical outcomes. Laboratory notebooks, analytical reports that build cases for moving or not moving on a program, memos and emails exchanged in times of major enterprise re-organization or a product launch are all materials that are candidates for archival preservation. They may have substantive business significance in the future. Organizations need to be educated about these materials; Sarbanes-Oxley has certainly given this role an important platform.
- Risk Assessors are good at projecting lost benefits and value of key knowledge assets that can't be re-used. They make cases based on metrics that demonstrate what the cost benefit will be for leveraging knowledge assets. This requires being tuned in to the business model, its goals and methods for reaching these goals.
- Knowledge geographers know how to canvas the enterprise landscape, identify and describe in meaningful, contextual terms what exists in the way of knowledge assets. They can also bring these assets into view for the organization, illustrating potential application of assets to the work of the company.
- Categorizing Experts are really indexing gurus. They know and understand how to logically structure content for ease of retrieve in a given domain. They know and understand their audience and how to give contextual meaning to the form of content organization. Devising tagging schemas and taxonomies for helping to create visual navigation into content is also a contribution to this discipline.
- Content Editors are the new collection development leaders. Through their understanding of an organization and its work, they can apply their expertise to determining what is worthy of publication to intranets and company knowledge bases. They know how to rank and prioritize what gets pushed to workers and what may be available but stored in the background for retrieval through enterprise search. Portals need these experts to determine what and where the knowledge assets reside in the "grand design."

Most of these titles are a synthesis of how I hear librarians describe the work they are now doing in organizations around New England. Some do this work from the venue of the special library, while others are populating departments where their expertise is filling a void in professional competence. Opportunities abound but you may have to create your own title. Through collaboration with other professions and departments, and with a willingness to take on responsibility for being both a change agent and knowledge asset architect, you can be part of a knowledge infrastructure that is solid and adapts to the organization and technological sea of change.

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