

Who Ya Gonna Call? How to Contact, Contract, and Collaborate with an Independent Info Pro

Pharmaceutical and Health
Technology Division of SLA

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Session Objectives

- Consider how you might use a contractor
- Outline the steps to get from an identified need to a working relationship
- Discover
 1. Strategies for identifying suitable independent information professionals
 2. Questions to ask and issues to address in negotiating a working relationship
 3. Tips for managing at a distance

Outline

- What to Outsource or Contract
- Contacting – Finding Suitable Prospects
- Negotiating – Defining the Scope of Work
- Collaborating – Managing at a Distance

What to Outsource Ongoing Services

1. Research, both primary and secondary
2. Cataloging
3. Document delivery
4. Freedom of Information Act requests
5. What else?

What to Outsource One Time Projects

1. Information audit
2. Web site development
3. Database design
4. Survey development and implementation
5. Other?

Contacting – Finding Suitable Prospects

Referrals

1. Colleagues within your company
2. Colleagues within SLA or other industry associations
3. Association of Independent Information Professionals (AIIP) Referral Service

Contacting – Finding Suitable Prospects

Directories

1. SLA CONSULT Online
2. AIP Online - You can search geographically, by services needed, and by subject specialty
3. *Information Services Market Place Directory* – forthcoming

Contacting – Interviewing

Questions to Ask

Qualify – decide whether the conversation will continue

Verify – confirm what you learn in these discussions

Clarify – points important to you and your library

Negotiating – Defining the Scope of Work

Do the Paperwork

General Contract

Letter of Agreement

Project Specific Proposal

Negotiating – Defining the Scope of Work

Do More Paperwork

Confidentiality agreement

W-9 – Request for Taxpayer ID #

Purchase order

Negotiating – Defining the Scope of Work

Points to Consider

1. Hourly rate or project estimate
2. Billing and payment
3. Timeline for project
4. Resources access – yours, mine, or ours; online and special collections

Negotiating – Defining the Scope of Work

More Points to Consider

5. Subcontracting
6. Format of deliverables
7. Contingencies – over budget, over time, rush rates
8. Confidentially agreement
9. Legal review

Collaborating – Managing at a Distance

Note – You have just hired an *independent* information professional.

People who succeed in this business tend to possess the following qualities:

- Self-starters, able to take initiative
- Motivated, able to deliver on a promise
- Excellent information skills

Collaborating – Managing at a Distance

Establish a preferred means of communication and build a relationship

1. Reply promptly to e-mails or voicemails
2. Clarify expectations
3. Provide feedback on results
4. Check in at agreed upon milestones or times

Collaborating – Managing at a Distance

Plan for contingencies

1. Results not delivered on time
2. Project goes over budget
3. Results do not meet expectations or agreed upon deliverable

Resources

Association of Independent Information Professionals (AIIP) Referral Service <http://www.aiip.org/AboutAIIP/referral.html> or +1-888-544-2447

AIIP Online Directory

http://www.aiip.org/AboutAIIP/directory_home.asp

Bates, Mary Ellen. "Outsourcing, Co-Sourcing, and Core Competencies," *Information Outlook* December 1997, pp. 35-37.

Bates, Mary Ellen. "Shopping for an Information Broker," *Searcher* September 1999, pp. 53-56.

ISMP Directory, Information Today, Inc. <http://www.ismp.info>

Special Libraries Association CONSULT Online

<http://www.sla.org/consultonline/>