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In this issue

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Oliver Rolfe, Head of Knowledge for KPMG in the UK

Oliver Rolfe is the Head of Knowledge for KPMG in the UK. He has been with the firm for nearly 17 years in a number of roles in the knowledge, technology and information risk area. After heading up the firm's Information Protection area for the past three years, he has returned to knowledge management in May this year to lead the team and programme for the UK firm.

06:40 : I live outside of London with my family in Marlow so it's an early start to join the commuter traffic as I head to Canary Wharf in London. I say a quick hello and goodbye to my early bird son who like clockwork is reliably sat watching Match of the Day repeats on his tablet.

07:15 : On the train and time to read an email news digest that is available to us in KPMG that pulls out key stories relevant to our firm, our wider profession, and the general headlines of the day. It is a fantastic piece of curated knowledge content that cuts through vast amount of data from a number of sources. I will also try and catch-up on various podcasts – the Infinite Monkey Cage being my favourite at the moment!

08:15 : In the office and straight into a call with KPMG's Australian member firm. We speak on the topic of people finding and the new tools and processes that we are both implementing. It is vital for us that we enable the ability for our colleagues to find expertise and resources around the firm quickly and easily, so that we can bring the best insights and the right people to our clients. This is not an easy task when KPMG has over 12,000 people in the UK, and over 150,000 people around the world!

09:00 : Some time to catch-up on emails and connect with people in the office. We have many great remote working tools and our people are encouraged to work intelligently, which may include home working or working from other KPMG offices. However these informal, passing conversations when in the office are very valuable, so I always make sure I make the most of them.

09:30 : A weekly team meeting with my senior managers in the knowledge team. A time for us to join up and discuss the bigger strategic matters our overall programme is working on, plus share and work through any tactical challenges we are facing in projects. There is normally one hot topic that dominates – this week it is looking at our latest quarterly metrics dashboard and interpreting what it means, and how we need to react to what we are seeing.

10:30 : Move straight on to the next meeting between myself, our Intranet lead, and the firm's Head of Learning design. Our knowledge management team is organisationally placed within our Learning team. We consider that a large part of learning comes outside of formalised teaching and e-learning and is obtained through on-the-job learning. This is enabled by many knowledge management objectives, for example sharing internal and external insights, and connecting and collaborating with others. In this meeting we discuss the work we are doing to bring together learning and knowledge systems and repositories, so that an end user receives learning content, regardless of whether it is piece of e-learning, a user generated video, or some external content.

11:45 : I head back to my desk and gatecrash a meeting between our onshore collaboration team and our offshore collaboration team based out in India. In total we have about 70 people in our offshore operations helping to deliver intranet, collaboration and research to our colleagues in the UK firm and they are an integral and highly important part of our team. As I'm still relatively new to my role, I am trying to meet as many people as I can, so I appreciate the chance to say a quick hello and share what my current thinking is on the programme.

12:00 : Time to grab some lunch. At this point I like to take the chance to catch-up on both our internal news hosted on our Intranet, and also the external news where we have content subscriptions. Our team works with many different vendors to ensure that we offer to the firm the best sources of external content covering areas such as news, sector insights, economics, and company information. Too much to read and not enough time, and get easily distracted by a flurry of emails and questions from people as they pass by.

13:00 : A meeting with our collaboration lead and an external vendor to discuss the rollout of our new video platform. Recently launched, we are finding good success and high levels of engagement with video content. Certain types of content, such as messaging from our leadership, is just so much better created and consumed through video. We discuss plans on how to further expand this through user generated content.

14:00 : I deliberately set some free time aside to catch-up on deliverables I am working on. It's that time of year where we are planning and budgeting, so a big effort is underway to meet deadlines. I enjoy piecing together what is a very large and complicated jigsaw where we have some large ambitious changes coming into the firm. I spend this time pulling together how we should approach our complex collaboration environment – both from a systems perspective and also on the plans we have to drive forward our communities programme.

15:30 : Time for a meeting now with our new Head of Pursuits. How we support every part of our business is at the forefront of our minds every day, and we see big opportunity for us to build out our competitive intelligence programme to support our market develop and sales. We discuss various ways and interaction points where we can come closer together and build this out.

16:30 : A quick run up the stairs to join the end of our induction day for new joiners. Every week leaders from around the organisation are invited to speak at these days to share their career stories and their perspectives. They are relaxed and good fun sessions that allow those presenting to help people get up to speed, and they are also

a great for taking questions and starting to connect with the new and future leaders in the organisation.

17:00 : No more meetings for the rest of the day. I open up our social collaboration system and write a short weekly journal to share with my team – just a number of short bullet points on what I have been up to, key people I've spoken to, and things I have learnt. It is impossible to speak with such a large and geographically spread team as much as I would like, so this is a great way to engage with everyone who can comment back and spark ideas and connections. Tackle some more emails, move our planning documentation forward a little more, and by then hopefully the London tubes and trains should be a little quieter now. I leave the office, plug in my headphones and look forward to finishing off that podcast on my journey home.

M&Ms: Mails and Meetings - My Day as an Information Management Officer

Ivan Donadello, Information Management Officer, European External Action Service, Bruxelles

If I wanted to briefly describe my working days, I would say: e-mails, meeting, and more emails. With different level of priority, these are the main elements of my working day as an Information Management Officer in an international organisation. During my day at the office, I am mostly busy collaborating with people and planning ahead for the projects the team and I are involved.

Most of my time in the office is about people and communication with them.

Despite my best intentions of not starting my day by looking at email, I end up by opening my Outlook first thing every morning nonetheless. Some good time is then spent on dealing with requests or catching up on streams of work. Also, I read the updates from the other parts of the organisation and relevant internal news as a way to understand better where the direction of the organisation are the most relevant topics for the business. Being rather new to the organisation, I am on the steep learning focusing on “who does what and why” in order to understand more and more the functioning of the house. I try to be alert of the main events taking place and to read the press releases. Information management is one of the many support functions and it can be easy to lose track of what the core of the organisation is interested in.

Usually a meeting interrupts the morning catching up: being involved in several projects means more meetings to attend. Working together is always easier to be said than done: different parts with different priorities need to find a common ground and talking face-to-face is often the best way. Currently I am involved in a project to upgrade a network used by the institution to exchange documents and information and my team’s role is to provide requirements on management of information and collaborate with the technical IT services to define the business needs and find appropriate solutions.

During my professional experience I realised that knowing how to interact positively with IT teams is very important. When well managed, it can be a refreshing and profitable collaboration. From our side, it is important to learn the language in use as much as possible and to understand how project management is conceived. Establishing partnership and trust is crucial when launching a new platform for your customers or negotiating a fix in the chosen software. We all agree that Information Management is more than only using a specific tool, but often the software in use is the most visible element in the eye of our customers: making it work well is important!

Our sector meeting could also take place, which is the occasion when the archive, document management and information teams share updates and issues we are experiencing. It is a regular meeting which brings about synergies and cross-fertilization, but also contributes to the team spirit. Usually, some following up from these meetings will fill the time until the lunch break: updating the team’s space

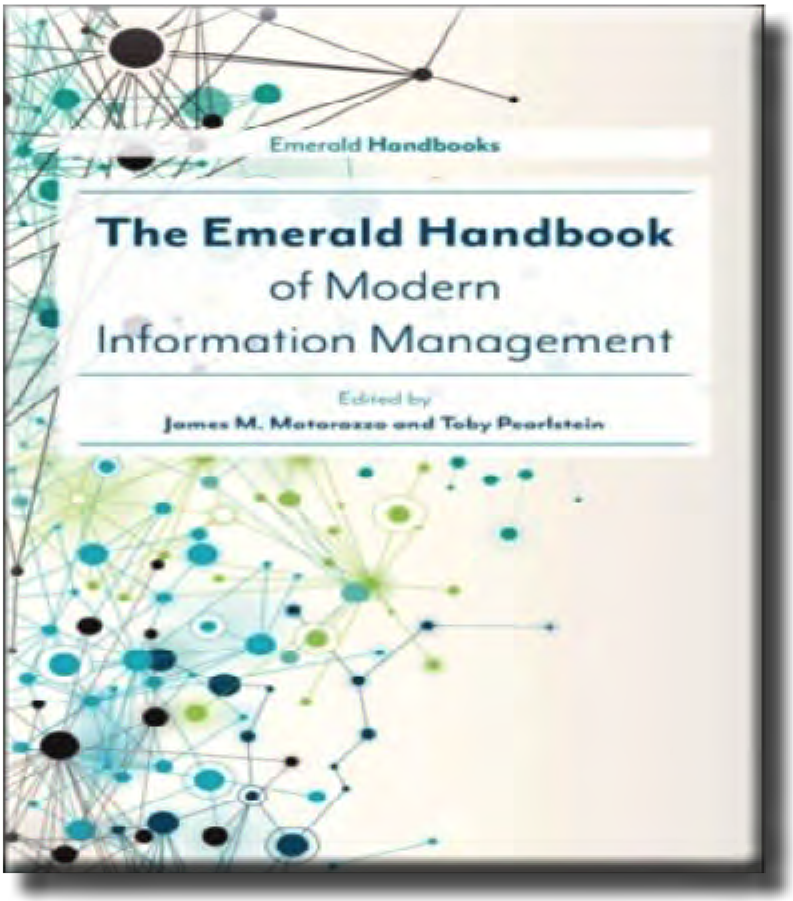
with new action points or sending more meeting requests to initiate or continue our projects. A quick run for coffee is always placed here and there throughout the morning. Sometimes, even coffee breaks can turn into informal meetings: but not often. In the afternoon, if no other meeting is in the way, I usually spend my time writing documents which have been requested or submitting them for approval. Also, I also devote time to planning the next phases of a project to improve some aspects of our current information management system. Thinking carefully about the communication and change management aspects requires a strategic and creative approach, for which help from team members is incredibly useful. Bouncing ideas and brainstorming is often the way to find new solutions. Also, part of my role is to monitor the status of and report on the advancement of the projects to the management to allow them to have a clear picture.

Our sector meeting are the occasion when the archive, document management and information teams share updates and issues we are experiencing. These regular meeting bring about synergies and cross-fertilization, and contributes to the team spirit.

When it is time to go home, I usually draw a list of things waiting to be done the following day and not to be forgotten. It is a way to save time the following day and to capture all that is still pending at the end of the day. Switching off the computer and locking drawers before running out of the building. In conclusion, most part of my time in the office is about people and communication with them.

Information Management: The State of the Art Review of The Emerald Handbook of Modern Information Management

Helen Edwards, Editor K&IM Refer

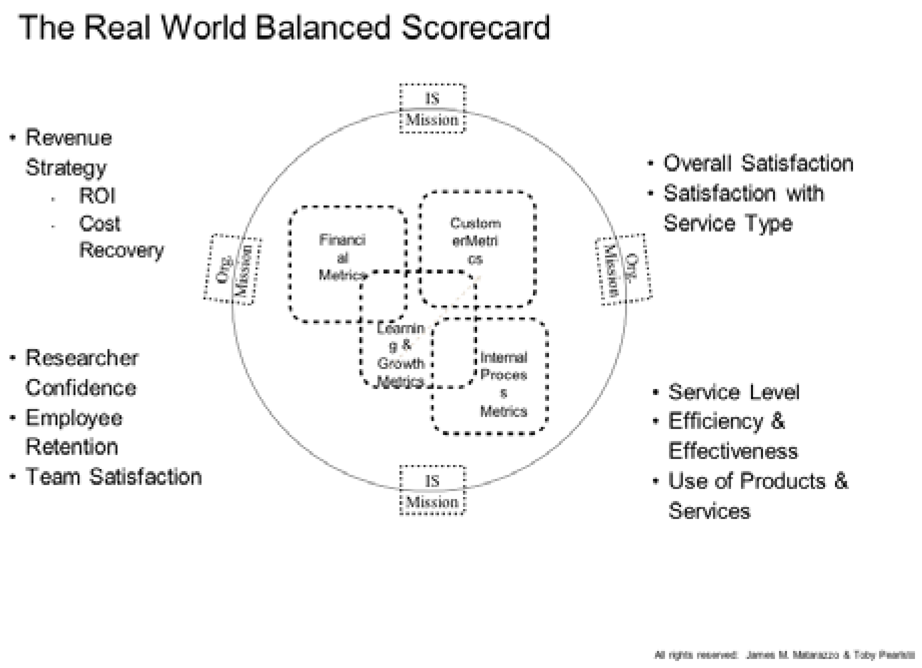


The starting point for *The Emerald Handbook of Modern Information Management* edited by James M. Matarazzo and Toby Pearlstein is the impact of Google *"the great disruptor*" on the world where information professionals work. Its conclusion, referenced in some way in each of the 38 chapters by experts from a range of sectors, is that the future and importance of information professionals lies in their ability to align with the goals of the missions of their organisations; to demonstrate this alignment in a way that is directly relevant to the organisation's definition of success; and to set up processes to advocate effectively and capture the evidence proving their value.

The book is organised in three sections:

- The economic and organisational context in which information professionals work and the skills needed to operate effectively within it.
- The use of *The Balanced Scorecard* as a strategy performance management tool to offer framework for demonstrating contribution.
- Future opportunities for information professionals in areas such as big data, competitive intelligence and talent acquisition.

Although a number of business tools are recommended in the book, it is *The Balanced Scorecard*, described by Robert S. Kapan and David P. Norton in a popular Harvard Business Review article that Matarazzo and Pearlstein find to be especially suitable to be adapted by information services to *"act as a guide to defining and quantifying the evidence that will enable the information professional to demonstrate how their services are helping the organisation to achieve success."*



The Balanced Scorecard consists of four quadrants:

Customer Metrics

This determines what services to offer, by measuring what is important to the customer. Matarazzo and Pearlstein warn there is often the risk of a significant mismatch between the perceptions of the library and those of users. Research on special libraries shows that libraries often overvalue:

- Conducting research on the user's behalf
- Managing the physical library and print collection
- Evaluating and purchasing content sources

But undervalue:

- Managing internal content
- Researchers working on project teams
- Integrating content into work processes

In order to avoid the danger of believing one's own rhetoric with regards to being customer centric, the authors recommend systematic *"identification of data/metrics/ rubric around what customers want and need as well as what they value."*

Internal Process Metrics

This quadrant explores and captures evidence on whether services are achieving their goals. Information professionals should ask: *"Is the information service providing a sufficient level of service to meet customer demand (within known constraints)? Are the services being provided efficiently in terms of turnaround time and cost? Are the services effective in terms of quality of content and delivery methods? Are the resources available actually being used (what is the penetration rate)? Are there other areas of information management such as KM, RM and Archives where IS involvement can improve information management in the organisation?"*

Learning and Growth Metrics

This quadrant looks at whether the IS staff are able to provide the quality and quantity of services required by the organisation? The focus is on training and development of IS staff and how the skills and competencies acquired are *"translated into roles that meet the needs identified in the Customer and Internal Process quadrants."*

Financial Metrics

The fourth quadrant is concerned with how the information service can illustrate, in quantifiable terms, its contribution to the organisation's budgetary bottom line". It requires an identification with the realities of the organisation's finances and business models.

In the ambitious Leading and Managing Strategy in the 21st Century, Mary Lee Kennedy and Rebecca Jones also advocate using a formal strategic approach from business literature to provide a leadership framework for the world of artificial intelligence, the Internet of Things and augmented reality. They believe organisations are counting on the information management profession to assist them in working in this new environment *"whether that means offering new analytical services, making sense of even more complex privacy and intellectual property laws, building research capacity, addressing content authenticity and reproducibility, preserving knowledge, helping to navigate an ever more sophisticated and opaque information environment, and many more possibilities."*

Facing future challenges from a different perspective, Tamika Barnes, Iyanna Sims and Christopher Moffat in their chapter Reference Reimagined explore the generational characteristics and technological advances that call for new *"postmodern"* reference services that celebrate differences. Using tools such as ethnography, they advocate *"designing a service that will respond to any user rather than the user conforming to the designed service."* In practical terms, this has often come to mean cutting back and consolidating reference services at reference desks in favour of *"roving, embedding and community centred services"* and looking to sectors such as retail, hospitality, computing and healthcare for inspiration to develop new models.

There are new constraints also for content acquisition. The chapter Negotiate for Information Like it is Your Own Money – With Savvy and the Right Skills by Willem C. Noorlander includes an enlightening section on how the current market place differs from when he began his career in the 1980s. Changes in supplier ownership, consolidations and mergers and the trend for venture capital firms to acquire small and medium sized suppliers has resulted in *"a harder and more structured approach to fee models and negotiations as well as a different mindset and concern about client loyalty."* However, this more challenging supplier environment has led to evolving roles in information sourcing, information procurement and supplier management. These roles

can have *"a high level of value attached, often interactive with critical business objectives and leadership as well as having a financial impact for the organisation."*

Of especial interest to the Knowledge and Information Management Special Interest Group is Eva Semertzaki's chapter Knowledge Management Skills Applicable to Information Management – Information Management Skills Applicable to Knowledge Management in an Organisation. Semertzaki believes that while both skillsets have much in common and both are future oriented, information management focuses on *"the acquisition, organisation, arrangement, storage, retrieval and use of information" while knowledge management practitioners "play a role as creators, owners, disseminators and users of knowledge."* Knowledge managers are explicitly concerned with the processes for creating knowledge and *"supporting the dialogue between people who possess knowledge.....the key difference between knowledge management and information management is the human factor which prevails in the first instance because humans are the generators of knowledge."* The chapter reviews competency frameworks for both information and knowledge managers and concludes that those for IM are weighted towards the technical and analytical, whereas for KM lateral thinking, change management skills and having appropriate personality traits become more important. However, within information management there is already *"a shift in focus from information to people as consumers of information."* Many jobs, whether characterised as information management or knowledge management roles require *"a mixture of technical, soft skills and local or business knowledge, ----- that the professional completely understands the information needs of the organisation."*

Indeed, contemplating the many case studies and individual examples included in the book, it becomes apparent that in many cases, it is the personal qualities of an individual in a specific context and the relationships they are able to make that leads to success, rather than any specific skillset or framework. In Marketing Your Expertise, Anne E. Rogers and Kaia L. Densch describe how they were able to thrive in a time of transition at the Cargill InfoCenter. Although threatened with both disbandment and even oblivion, their success in engaging *"strong support from our stakeholders and constructive analyses of needed work"*, in part by effective benchmarking of similar organisations, led to their survival intact and with their value enhanced. Their tagline *"a small footprint but a big impact"* helped their services to move from being the best to the *"worst kept secret in the company"* as their visibility increased and they were able to extend their services into new areas.

Because the success of projects is so often down to the individuals involved, changes in the environment often result in once successful initiatives and practices running their course. In Models of Service in an Age of Acceleration, Claire B. Gunnells and Susan E. Green review a number of library collaborations, not all of which achieved the hoped for monetary and service advantages. The original leaders move on, new leaders do not share the commitment and can be *"hard pressed to find success stories of why and how the project was created in the first place"*, and relationships at a more junior level can fail to develop. Nevertheless, information professionals need to be out there *"breaking the rules, shattering myths and forging new alliances with colleagues and customers alike."* This book is a serious contribution to helping information professionals do just that.

Emerald Handbook of Modern Information Management
James M. Matarazzo and Toby Pearlstein
Emerald Publishing, 2017

Why and How We Wrote the Knowledge Management Standard (BS ISO 30401)

Judy Payne (Hemdean Consulting), Nick Milton (Knoco Ltd.), Ron Young (Knowledge Associates)

Judy, Nick and Ron are members of the ISO working group that developed ISO 30401 Knowledge management systems – Requirements and members of the UK mirror committee BSI KMS/1. This article contains their personal experiences and views.

'Knowledge' and 'management' are familiar, everyday words. But does everyone attach the same meanings to them? And is there a common understanding of knowledge management? Each of us has worked in KM since the 1990s and we can say with confidence that the answer to both questions is 'no'. When somebody approaches us to talk about knowledge and KM, it often becomes immediately apparent that we have totally different views of the topic. There is no common understanding of what KM means, let alone a standard approach to delivering KM.

We recognised the proposed standard as an opportunity to create a common language for global conversations about KM that just might help organisations manage knowledge more effectively.

Various standards organisations (including BSI and Standards Australia) have already published guides to KM, but ISO was silent on the subject until January 2014, when we became aware of a proposal for a new ISO standard on KM. The proposer was SII, the national standards body in Israel, where a national KM standard had been published in 2011. The proposal was for a management systems standard (MSS) of the 'requirements' variety: a standard to which organisations can become certified, although this is voluntary. ISO 9001:2015 (Quality Management) is the best known requirements-based MSS.

The KM community's reactions to the proposal were mixed. Some KM practitioners and academics rejected the proposal because they disagreed with the content of the Israeli standard on which it was based, in spite of assurances that the content would change significantly once it entered the ISO development process. Some thought it was a good idea. Some rejected the proposal on principle, on the basis that KM can't be standardised. Although we agree that every organisation is different and that KM recipes don't work, this proposal wasn't for a KM recipe. It wasn't even for a list of the main ingredients of KM: it was a proposal for setting out the principles of a kitchen in which KM recipes could be created and tested.

We recognised the proposed standard as an opportunity to create a common language for global conversations about KM that just might help organisations manage knowledge more effectively. It was also an opportunity to help people avoid falling into the KM traps of the past, for example the trap where KM is a rebadging of content management, or where people think KM can be delivered through technology alone.

When the proposal was approved, ISO wanted an existing technical committee to take on the work of developing the standard. Technical Committee number 260 (TC 260), Human resource management, agreed to adopt the standard and created a working group to draft it. In the UK, BSI resurrected the KMS/1 committee responsible for their 2001 KM guides and we each accepted the invitation to join. Not wishing to do things by halves (and without fully understanding what we were letting ourselves in for) the three of us also agreed to join the ISO working group.

How ISO works

ISO has 161 members, each a national standards body with its own policies and practices. That's almost as many as the United Nations. Over its 72 year life so far, ISO has developed and established formal processes for developing standards in multi-stakeholder groups. It's easy to criticise ISO processes for being bureaucratic, outdated and lacking in transparency (and we did!) but we had to play by the ISO rules. ISO processes are accepted by all 161 ISO member countries, from Afghanistan to Zimbabwe. The diversity of values, philosophies and perspectives is mind-boggling. Even seasoned, independent-minded KM specialists who know a bit about collaboration don't mess with that!

The ISO watchword is consensus. Don't be fooled. This doesn't mean representatives of up to 161 countries agree on everything. Developing a standard involves listening, appreciating others' perspectives, and compromising. If a member of the group feels that the ability to comprise is being stretched too far, the words 'I can't live with that' are enough to force a rethink. The result is a standard that all members of the working group can support.

Learning to swim at the deep end

The first face-to-face meeting of the working group was in November 2015, in parallel with meetings of TC 260 and its other working groups. It's fair to say we got off to a shaky start. The proposal had been prepared independently of the parent committee, which didn't yet understand KM. Most of our working group members were new to ISO processes, and relationships were yet to develop. Our convenor was disciplined, focused, and keen to move straight to the work of developing the content: an approach we came to appreciate later in the process, but in the early stages we needed to move more slowly.

During three days of solid meetings, it became clear that the standard had to be written to a standard template used for all management systems standards. The template contains text and definitions that cannot be changed, only added to. It also became clear that we could use devices such as 'notes to entry' to make the template text KM-specific, and that we could use the introduction and annexes to top and tail the standard without working to a template.

Over the next 30 months we worked together face-to-face, virtually, as a whole group and in sub-groups. Working relationships and friendships developed. We learned that different countries have very different approaches to KM. We learned the magic ISO words 'shall' (to indicate a requirement) and 'should' (to indicate a recommendation). We learned that some English words are impossible to translate into other languages.

Membership of the working group, as well as being voluntary and unpaid, is best described as dynamic. During the development process, over 40 KM experts from

fourteen countries were involved – plus delegates from the parent committee, members of other working groups and representatives of national standards bodies. The UK mirror committee met frequently, as did other national groups. Every word and every concept in the standard was subjected to repeated scrutiny. We tested whether the wording was based on proven experience, would work for KM in every industry from call-centres to engineers or to aid workers, and would work for all sizes of organisation from the garage-based start-up to the multinational.

Public comments

In late 2017, a draft international standard (DIS) was approved by the participating TC 260 countries and published for comment. Each ISO member country has its own process for inviting comments. In the UK, BSI published the DIS on its website and anyone could comment. As a result, BSI received many hundreds of comments, often from people in countries without such an open system.

Most of the comments were positive and constructive. Some were repeated. Some pulled the standard in opposite directions. Many commenters didn't appreciate the existence of the MSS template (why should they?) and rewrote chunks of the inviolable template text. A few criticised ISO processes and called for more recent specific KM developments to be included, but this is not how ISO standards work. ISO standards are necessarily generic, otherwise standards would be out of date, would stifle innovation, or both.

Every single comment was discussed by the UK mirror committee, which produced a consolidated set of recommended changes for consideration by the ISO working group. These and other comments – whittled down now to just over 400 – were discussed at a final three-day meeting of the working group in May 2018. Many changes to wording and emphasis were agreed, but nothing substantive enough to force a second round of public comments or voting according to our ISO "referee".

Working relationships and friendships developed. We learned that different countries have very different approaches to KM.

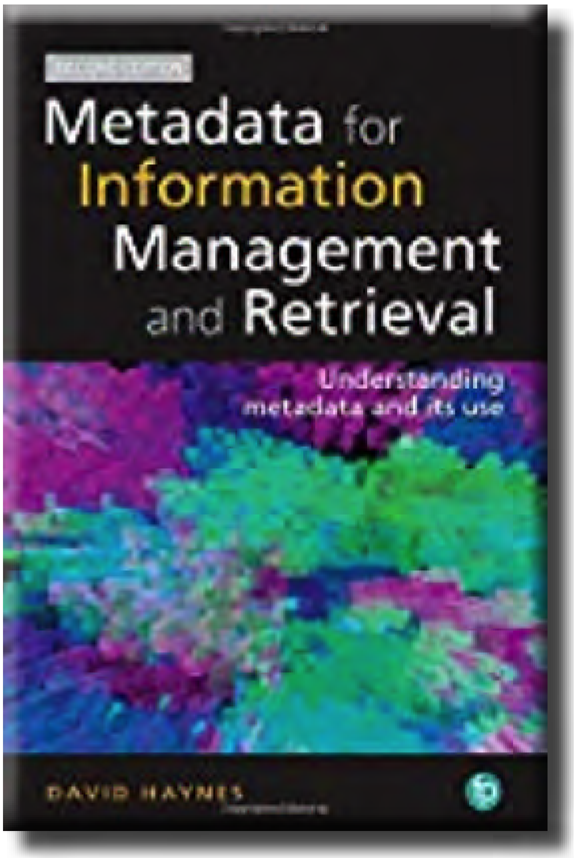
The future

ISO Management Systems Standard 30401: Knowledge Management is due to be published in late 2018. Our work is over, for now. The standard will be reviewed and updated in five years' time, once we have some experience of its use and application. Future versions of the standard will include recent KM developments – and might well be developed using updated processes.

We can only speculate about how the standard will be used. Certification is an option – but we don't think this will be widespread. It is much more likely that organisations will use the standard as a guide to getting started in KM, while those with established KM programmes will use it to audit against internally.
We hope that publication of the standard will lead to conversations that improve awareness, understanding and practice of KM. We hope it will provide a common language, and a way for organisations to avoid the pitfalls of the past when implementing KM. To us, the standard is a first step towards a better future for KM – and for Knowledge Managers – the world over.

Understanding Metadata and Its Use: Review of Metadata for Information Management and Retrieval by David Haynes

Dion Lindsay, Real Knowledge Management (DLC Ltd)



It is good to be able to welcome a new edition of David Haynes' *Metadata for Information Management and Retrieval* (Facet Publishing 2018). It is as rigorous as before. It is also rewarding as a reference text for an information and knowledge management professional like myself with an enduring interest in the application of "cat and class" principles, as I expect it will be for the most scientific of metadata specialists.

To quote the author, the book is intended for *"museums, libraries, archives and record management professionals, including academic libraries, publishers and managers of institutional repositories and research data sets"*. As such, it sounds like a book on how to do it, which Haynes denies in the very first sentence of his preface. Instead, it is a captivating analysis and narrative of the why rather than the how.

This edition sticks to the last of the first edition (Facet Publishing, 2004), concerning itself with explaining the concepts of metadata and their use in an expanding range of environments. For the new edition, these include the big (and increasingly public) data of pharmaceutical research companies, the use of metadata in e-commerce and e-government, and the analysis and description of the semantic content of multimedia materials. In fact, a major difference is the breadth of new practical applications Haynes is able to discuss (without incidentally turning the book into an encyclopaedia - the new edition has only a modest increase in size – from 179 to 237 pages).

Below-the-surface analysis of the use of metadata certainly can get complex, and some sections in the 2nd edition are seriously challenging as well as fun. Here is some text from a section on Shannon's Information Theory (unit = unit of communication, such as a word or phrase):
"The average quantity of information conveyed by a unit (expressed as entropy) reaches its maximum when the probabilities of word occurrence are all equal to one another... The less frequently a unit of communication occurs, the more information it conveys. This can be used to compute the incremental value of a two-word term over its separate components... This approach leads to a mathematical analysis that is independent of linguistic analysis. The entropy, H, is equal to minus the constant, k, times the sum of the probability of occurrence of term i, times the log of the probability of occurrence of the term, i.,... [pp 97-98]"

Two pages later, there is a short section on vector retrieval algorithms which uses mathematical symbols, not easily reproduced in this review. Half the fun of this book is that Haynes manages to flex between short bursts of complexity such as these, and (for example) descriptions of the development of metadata standards in their historical perspective.

The author follows a similar structure in the second edition as he used in the first. The key chapters (gathered here into a separate section on Purposes of Metadata) are subtitled Purpose 1 to Purpose 6, and each of those chapters ends in a pithy conclusion which are generally so good it seems a shame – it racks up the temptation to skim read. In the 2004 edition Haynes restricts his discussion on how metadata aids information governance to the importance of audit trails, the concept of "respect des fonds" (broadly ordering records by creatorship provides authenticity and context) and the importance of this in court cases. In the new edition he elevates information governance to a brand new Purpose 6 chapter with coverage of metadata to Freedom of Information and Data Protection.

I would rather the second edition had retained the bibliographic pattern of the first, with References and further sources of information at the end of each chapter, instead of gathering them all into References at the end of the book. For me, the former has a feeling of separate essays which are digestible on their own, which makes the work more readable, but that might not be to everyone's taste!

The book is very well referenced, with 307 works cited in the list pp 239-256, ranging from personal works such as C.E. Shannon 's A Mathematical Theory of Communication (1948) to 21 ISO Standards and 6 W3C publications from 2012 to 2016. As a good index should, this one provides a readable commentary – I make no apology for using it to discover at a glance, that in 2018 there are 22 different metadata standards worth describing, compared to 11 in 2004!

As a KM specialist, I was only a little disappointed to be directed by the index to page 323 for a Knowledge Management discussion in a book that runs to 267 pages: for the record, the right page is 232. Ironically, that's the only slip I've been able to find!

Throughout the book there is no hint of padding or condescension - I had the same sensation reading it from cover to cover as I had reading F W Lancaster's *Information Retrieval Systems: Characteristics, Testing and Evaluation* on the bus into Whitehall every morning in the early 1980s – the excitement of needing to read every word carefully (often twice) and the reward of a new concept absorbed on almost every page. I can imagine the sense of professional growth information professionals will feel by giving this book the effort it deserves.

Metadata for Information Management and Retrieval: Understanding Metadata and Its Use. 2nd ed.
David Haynes
Facet Publishing, 2018.

Charnwood Connect: A Holistic Knowledge Management Strategy for the Voluntary Sector[1]

Moya Hoult[2] , Gillian Ragsdell[3], Peter Davey[4], and Paul Snape[5]

Introduction

Advice services play a valuable role in ensuring people are well-positioned to make informed choices and decisions that enhance their health and wellbeing. The public and voluntary sectors make an important contribution to the provision of these services. Over time, particular provision and specialist knowledge has become associated with specific agencies, and individuals have been able to access it accordingly. It has, however, become challenging for the demand to be met. Increasingly, individuals are accessing services at times of crisis, perhaps when they are at serious risk of becoming homeless, on the edge of bankruptcy, or while coping with escalating mental health issues. In addition, since crises are not neatly packaged, there is a growing need for individuals to draw on the knowledge of multiple agencies. So there is a need to design a more efficient and effective way of ensuring that support is offered in a timely and joined up manner.

Charnwood Connect, funded for two years by the Big Lottery Advice Services Transitions Fund, was designed in response to changes in UK social welfare and housing policy. It aimed to encourage voluntary and public sector organisations to work together to achieve more for clients and service providers, by adopting an integrated model of best practices in knowledge management. The project was led by Citizens Advice Charnwood and The Bridge (East Midlands); an additional eight advice agencies within the locality were included.

A Holistic Approach

The project was underpinned by knowledge management principles, with particular emphasis on successful knowledge sharing between the project participants as well as with their clients. A holistic approach was taken, with attention paid to both technical and social aspects. The former was primarily addressed by the development of an IT Knowledge Hub and the latter by the creation of The Forum. Given that project participants had previously been in competition for funding, a key challenge was to support the building of relationships and trust. Over time, there was an increase in mutual awareness and respect about the work of different partners that accelerated improvements in collaboration and in achievement of the project aims.

Charnwood Connect's overarching aim of building resilience into advice provision across the locality was to be achieved by four distinct, but joined up objectives. The development of a multi-faceted bespoke Knowledge Hub was a core objective of

[1]An extended account of this project can be found at Hoult, M., Ragsdell, G., Davey, P. and Snape, P. 2017, Charnwood Connect: Holistic knowledge management for building resilience in the voluntary sector, In Remenyi, D (ed) Knowledge Management and Intellectual Capital Excellence Awards 2017: An Anthology of Case Histories, ACPIL, pp.27-40, ISBN: 978-1-911218-50-0
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Charnwood Connect and is the focus of discussion herein. There were two distinct areas to the Knowledge Hub. One aspect was to support practitioners in terms of specialist learning, policy and procedural updates, and legislative updates – The Forum. The second aspect – the IT Knowledge Hub - was a client-facing resource, to include information on all available services within the locality, access to online advice and information resources, and information about referrals and signposting.

So, the Knowledge Hub appreciated both codification and personalisation strategies to knowledge management. It was a cornerstone to the project, since it supported explicitly and implicitly,Charnwood Connect's other three objectives of:

1. Prevention, advice and specialist support - Charnwood Connect will offer an empowering service. The aim is to enable people to take control of their lives by offering advice, information and support on social welfare law.
2. Education, training and enabling - Charnwood Connect will offer a financial education training programme giving skills, knowledge and confidence to enable people to make informed decisions regarding the use and management of money.
3. Volunteering - Volunteering is an effective pathway to employment. Charnwood Connect will build upon and develop the successful volunteering model which is delivered by CAB. This will contribute to ensuring that Charnwood Connect can meet the ever increasing demands for frontline service delivery.

The Knowledge Hub

The Knowledge Hub comprised of a technology-centred element – IT Knowledge Hub – that complemented a human centred element known as The Forum. In keeping with meeting the needs of as many stakeholders as possible, these elements were designed to serve both clients and practitioners; there was commitment to genuine participation from them in the design process.

The functions of the IT Knowledge Hub are shown in Figure 1. In addition to client involvement, out of necessity a specialist IT and web design organisation was commissioned to move the design concept into a practical tool. The ethos of the organisation aligned firmly with that of Charnwood Connect, and this was a key consideration in the selection process.

Figure 1: Functions of the IT Knowledge Hub

Alongside the development of the IT element, The Forum was established at an early stage of the project, with quarterly meetings taking place within the locality. It was a valuable platform for building communities of practice in which knowledge was shared, and there was collaboration on issues of concern to clients. In the spirit of the cultivation of such groups, The Forum elected from amongst its number a chair and vice chair, and agendas were agreed by the partners.

Challenges

Charnwood Connect was an ambitious, cutting edge project; it was pioneering with respect to the processes it promoted – i.e. knowledge management practice - and with respect to the context of operationalisation – i.e. the voluntary sector. So, it was not surprising that a host of challenges were encountered, including:

- Effective partnership working
- External environment
- Internal environment
- Lack of joint vision/common bond
- Time resources
- Dedicated Leadership/Management
- Data sharing

Without doubt, advice services provision is knowledge-intensive yet, prior to Charnwood Connect, knowledge management was not overtly practised within any of the project partners. Rather, knowledge management was intuitive and implicit within partner organisations. Limited, if any, knowledge sharing was occurring between partners. While business models and theories are used in the management of voluntary sector organisations, their origins may restrict the extent to which they can capture the purpose, charitable nature and ethos of organisations beyond those which are profit making: the holistic and critically reflective manner in which knowledge management principles were applied negated this possibility in Charnwood Connect.

The context for this application of knowledge management and the cultural challenges that it brought were more difficult to manage. There were practical and conceptual obstacles. From a practical perspective, although the long term benefits of the project were appreciated by partners, it was inevitable that the day to day urgency to support clients in desperate need of help sometimes reduced their capacity to contribute to Charnwood Connect. This was the nature of the environment of the project. Additional practical challenges related to the complex particularities of client groups and the need to adhere to data sharing protocols; none of these challenges were insurmountable, but they did consume resources in an unanticipated way.

Although there were other cultural differences between partners, the conceptual obstacles were largely borne out of the competitive nature of funding within the voluntary sector. Prior to Charnwood Connect most partners regularly entered the same competitive tendering processes; all required funding to secure core posts and there was a limited 'pot'. So, moving the mind-set of partners from one of competition to one of collaboration was a huge challenge, but was a necessary conceptual transformation for the success of the project.

Summary

A host of evidence has been gathered to demonstrate Charnwood Connect’s impact. The project is a case study of successful implementation of a knowledge management strategy in a sector with extreme operating conditions - uncertain resources, a transient (volunteer) work force, and clients who are often at crisis point. It was an ambitious project that was underpinned by a holistic model of knowledge management. There has been a plethora of learning outcomes from the project; not only for the individual partners, but also for the voluntary sector in Charnwood and beyond. The project leaves an important legacy and is increasingly recognised and promoted in discussions with funders, decision makers, including Members, and policy makers.

CILIP Conference 2018, Brighton

Lynsey Sampson, University of Strathclyde

I couldn't believe my success in securing a bursary place to attend this year's conference through CILIP's Knowledge and Information Management (K&IM) special interest group. As well as looking forward to the actual conference, I was really excited that this year it was in Brighton as I had been for a trip there previously and absolutely loved the quirkiness of the place. To top it off, the exceptional summer weather that we were having in the UK stayed around for the conference, and so it felt like a proper summer mini-break!

Networking and socialising opportunities

A key aspect of the conference for me was the opportunity for networking with other like-minded Library and Information Professionals. I decided to attend a pre-conference guided walk of Brighton the evening prior to the conference, organised by one of the special interest groups and led by a Blue Badge Tourist Guide. As well as providing me with more of a familiarity of Brighton, it was the ideal opportunity to get to know other delegates. Afterwards, as a result, six of us went on to find somewhere to have a meal together. We hit it off so much so that we swapped Twitter handles, becoming friends at the conference, and we have since stayed in touch with each other post-conference through the creation of our own WhatsApp group. I can honestly say that my decision to attend the walk resulted in much more of a worthwhile conference experience, which I could share with my new friends, and felt much more involved in the conference this way.

Opportunities to meet others were further enabled at the conference through a welcome meeting point, with board games available to encourage engagement with and interaction between delegates, as well as a workshop specifically on networking effectively. To me, this felt like a very positive strand to the conference format, as I previously experienced a sense of nervousness at the beginning of the CILIP conference last year and had to initially really push myself to engage with others. I was pleased to learn of a 'seafront run' being organised for the morning of the second day of the conference. I felt committed to attend, even though the evening drinks reception on Brighton Pier with fish and chips and fairground rides was the night before; as I felt it was another opportunity to experience one of my favourite forms of exercise, as well as being able to meet more people. Jo Wood, the creator of a newly established Podcast, '[Librarians with Lives](#)', was also on the run. She had been doing a special conference Podcast on delegates' experiences at the conference, and I was lucky enough to feature in it. My enthusiasm for participating and the fact that I was the only professional from Scotland she has interviewed, has resulted in me featuring in the next Podcast episode this September!

Break-out sessions

I really enjoyed soaking up the atmosphere and knowledge throughout the two days of the conference, especially the break-out sessions where I could specifically choose which sessions were closest to my interests. Two which I found very interesting were the seminars on re-defining library spaces and examining the engagement of information literacy. Both topics warranted ideas which could be applicable to my workplace.

In the session on re-defining library spaces, it was thought- provoking to hear of two 21st century library buildings, The Hive (Worcester) and The Word (South Tyneside), which have enabled the library to be much more of an inclusive space, embracing technology to attract more of a cross section of society. I was in awe at the photographs of both library buildings, each housing what seemed like state of the art technology – 3D Printers, temperature-controlled areas complementing the exhibitions being run, acoustic sofas, 360-degree digital immersive storytelling space, studio, and exhibition space – whilst also slightly envious that these new library buildings are still much of a 'rarity' at the moment and not something that we all experience when entering a library. I felt this session was worthwhile in providing a future vision into how these libraries work in practice. For example, the Hive is the first library building, operating jointly as a public library and an academic library. As my position is within an academic library, I found it interesting to hear how such a joint proposal progressed and now works in practice. The session inspired me to read up more on 'The Hive'. I learnt that this type of library can have benefits for both the public and those studying or working within the university as demonstrated in this article within Science Direct.

Out of pure curiosity, I decided to attend the session on 'Prison Libraries Change Lives', as I have a personal fascination with this type of library and I have previously had the opportunity to visit the prison library at Carstairs prison. Libraries such as Carstairs prison library demonstrate the ability to educate and transform prisoners, and it seems to me, act as a key part of the rehabilitation process. It was also eye-opening to learn that there is a larger prison population which is increasing in age, and that many prisoners are experiencing age related illnesses such as dementia, so that the prison library has a key role in assisting with their mental health through activities that generate discussion and interaction.

Unfortunately, due to unforeseen train cancellations on the Southern line, I was disappointed I was unable to attend the last break-out session of the second day, and therefore the session on learning and information literacy became my last session. Within a few minutes of this session beginning, I was quickly reassured that I had chosen a worthwhile session to finish on, as all speakers on information literacy provided stimulating ideas and findings. Although not directly related to academic libraries, I particularly liked hearing about other sectors" experiences and approaches to information literacy. A key theme I took away from this session is the importance for instilling key information skills throughout society and working collaboratively to do this throughout all sectors. I felt astounded at the particular example given by Ruth Carlyle from Health Education England that 43% of adults are unable to give the correct paracetamol dosage to a child after reading the accompanying information leaflet.

Keynote Speakers

I had mixed views on the keynote talks: generally the speakers on the first day were more relevant and engaging than those on the second day. I imagine this was largely due to the subject matter and my own interests. Learning about the role of Penny Young, the House of Commons Librarian, and gaining a brief insight into what her role involves in such an interesting work environment, as well as hearing a motivational speech on professional progression from Sally Walker, Scotland's library and information professional of the year 2017, really held my attention. Hearing from someone like Sally, conveyed to me the real value of finding a library position that really complements personality and interests. Sally certainly came across as someone who loved her role, relaying the creative ways she has connected with the local community as Children's Librarian for Orkney public library. My favourite library initiative of hers, due to its cute factor, was the 'Teddy Sleepover', encouraging children to loan their teddy to the library, resulting in the teddies being captured on social media in different library scenarios! I could see from Sally's impassioned speech, how much the award has meant to her. I was also very impressed by her outreach work, an example being contributing to 'baby skills courses' in secondary schools by educating teenagers on how to read books to very young children. She clearly deserved the award, given the range of activities she was involved in to encourage library participation.

Overall impressions

Compared with other conferences I've attended, I would undoubtedly say that this year's was by far the best in terms of the opportunities to socialise and engage with other delegates. I really enjoyed this and feel it added value to the conference.

As part of my bursary place was to actively tweet at the conference, I felt this was a good motivation to re-open my Twitter account and practise tweeting pre-conference. I found myself confidently engaging with the CILIP Twitter hashtag as well as forging connections with other delegates that I found within the LIS Twitter community. I actually felt this also added an extra element to the conference as there always seemed to be something going on through Twitter, even outwith the conference hours, giving me a sense of always being connected to the conference experience throughout my trip. I plan to use my Tweets as evidence in my Chartership submission.

I have already presented an information session to my colleagues as part of our training week. I told them about on my impressions of 21st century library buildings, 'The Hive' and 'The Word', as well as my interpretation on the Information Literacy sessions and how certain ideas could be translated to our workplace. The question and answer session that followed my presentation generated interesting discussion amongst my colleagues on how we convey information to our customers and on the idea of forging some form of partnership with public libraries. I also plan to include this presentation and report as evidence for my Chartership. I am truly thankful to the K&IM special interest group for giving me an opportunity that I will never forget.

RIVAL – Research Impact Value and LIS: Report from a Community Event held at Edinburgh Napier University, 11 July 2018

Anne Fraser, Hon. Secretary Knowledge and Information Management SIG

The event was organised by Hazel Hall and Bruce Ryan of the Centre for Social Informatics at Edinburgh Napier University. It was open to all those interested in making Library and Information Science (LIS) research more relevant and effective, including officials of professional bodies such as the Chartered Institute of Library and Information Professionals (CILIP). The aim was to strengthen the links between researchers, practitioners and users of research in the LIS field (public, academic, health etc.) and to lay the ground for future support and collaboration.

I arrived to find the room already full of colleagues including a familiar face from my last place of work, the Department for International Development (DFID). Maureen works for DFID's Research and Evidence Division. I am now carrying out the role of Hon Secretary for the CILIP Knowledge and Information Management (K&IM) Special Interest Group (SIG). We were both keen to hear the views of LIS researchers and fellow participants working in the public, academic and special library service areas.

It was a thought-provoking day that gave us the opportunity to share experience and ideas with a broad cross-section of colleagues.

Hazel Hall began the event by giving some background on the RIVAL initiative. She was Executive Secretary for the LIS Research Coalition, a very successful 3-year project set up in 2012 to help facilitate a co-ordinated and strategic approach to LIS research across the UK. The Coalition was funded by the British Library (BL), CILIP, the Joint Information Systems Committee (Jisc), the Museums, Libraries and Archives Council (MLA) and the Research Information Network (RIN). It supported a project to set up a formal UK-wide network of LIS researchers (Developing Research Excellence and Methods – DREaM), and another to determine the factors that increase or hinder the impact of research project outcomes on practice (Research in Librarianship Impact Evaluation Study – RiLIES).

Yvonne Morris from CILIP updated us on a follow up project that is supported by groups including the K&IM SIG. The aim is to build on the legacy of the coalition by assessing ways of setting up a CILIP Sector wide research portal/evidence base. A report has been produced by Pete Dalton (Birmingham City University) and Sarah McNicol (Manchester Metropolitan University). On 19 June, this was presented at a Round Table of over 25 key stakeholders, including the BL, Department for Digital, Culture, Media and Sport (DCMS), Libraries NI, Sconul, Health Libraries England, the Welsh Government and SLA Europe. Options for next steps on the portal are under discussion and include scoping out a possible prototype.

Several presenters followed this with examples of research undertaken in cooperation with or by practitioners that is helping to improve the provision of services in different areas. They brought up many issues around improving connections between researchers and practitioners, and making research more practical and relevant. These fed into a discussion session later in the day that allowed us to exchange views on such topics as:

- How to obtain funding for LIS research
- Role of professional bodies
- Data collection, GDPR and ethics
- Research skills of librarians
- How to help practitioners carry out and publish research

Alison Brettle, Professor in Health Information and Evidence Based Practice at the University of Salford and chair of the CILIP Library & Information Research Group (LIRG), gave the closing keynote speech. She described how research is being used to improve LIS services in the health sector, e.g. through the Value and Impact Toolkit for Library and Knowledge Services. She is currently working with Hazel Hall on a CILIP-supported bid for joint UK research council funding aimed at establishing a network to develop research skills within the LIS community through systematic reviews of the librarianship literature. LIRG sponsor a Practitioner Researcher Excellence Award. The 10th International Evidence Based Library and Information Practice Conference is taking place in Glasgow in June 2019 and she urged us to attend.

It was a thought-provoking day that gave us the opportunity to share experience and ideas with a broad cross-section of colleagues. We were also able to view the War Poets Exhibition and hear more about its fascinating collection of archives based on the Napier Craiglockhart building's former life as a Military Hospital, with patients including Wilfred Owen and Siegfried Sassoon.

Thanks are due to the presenters and to Hazel and Bruce for providing us with the opportunity to take part and feed into the next stage of a very worthwhile set of initiatives.

A full report on the event is available here, with links to all the presentations: https://hazelhall.org/2018/07/25/research-impact-value-and-lis-lis_rival-resources-and-review

Other references LIS Research Coalition site: https://lisresearch.org/links/lis-resources/

CILIP Sector wide research portal/evidence base project report: https://archive.cilip.org.uk/research/scoping-vision-robust-reliable-evidence-base-information-profession

Making Taxonomies Go Further at Taxonomy Boot Camp London

Kat Allen, Infotoday

The third Taxonomy Boot Camp London (TBCL) takes place at Olympia London on 16 and 17 October 2018. Europe's only dedicated annual conference for taxonomy practitioners, TBCL helps delegates discover and implement new taxonomy applications to drive and manage content efficiently and effectively. CILIP K&IM members benefit from a 25% discount and there are generous discounts on offer for multiple delegates from the same organisation.

"Taxonomies are the backbone of any project that aims to use information more effectively."

This year's theme – 'Making Taxonomies Go Further' – aims to meet the needs of people whatever their level of experience, from absolute beginners to those pushing the boundaries of taxonomy applications.

Why are taxonomies more relevant than ever? Taxonomy Boot Camp's Programme Chair (and Taxonomy, Metadata and Search Consultant) Helen Lippell puts it very succinctly, "Taxonomies are the backbone of any project that aims to use information more effectively. A good taxonomy brings the power of human understanding to cutting-edge technologies as diverse as content management, machine learning and enterprise search".

TBCL's keynote speakers are both leading specialists in information architecture and content strategy. The conference opens with a thought-provoking keynote from Springer Nature's Paul Rissen entitled 'This is the Bad Place: 13 rules for designing better information environments'. "I'll be speaking about the current state of our digital environments, particularly in terms of how they shape our culture and discourse in society, politics and journalism," explains RIssen. "I'll be exploring a set of thirteen rules for designing better information environments, taking into account the power and responsibility that these places play in our lives."

Tom Reamy, Chief Knowledge Architect at KAPS Group will open Day 2 of the conference with 'Selling the benefits of taxonomy: numbers and stories', a powerful multi-faceted approach to convincing others of the benefits of having taxonomies. "I will be speaking about how to make the business case for taxonomy", he explains. "Even though taxonomies continue to grow in popularity and status, there are still many organisations whose C-Level officers remain unconvinced of their value. So, how do you make the case for taxonomies to all the myriad audiences? Start with no one size fits all, make the usual ROI calculations, add in stories of successes and more importantly the spectacular failures of the cost of not having taxonomies, and enlist champions within the organisation. But finally, the best argument is that organising the intellectual property of an organisation is as essential as organising the company into departments and roles".

Other speakers at TBCL include CAB International, Cancer Research UK, Government Digital Service, Lloyds Bank, London Borough of Hackney, Publications Office of the European Union, Stockholm Environment Institute, University of Glasgow, Wiley and World Bank.

According to Conference Chair Helen Lippell, "It's heartening for people like me that the exciting possibilities for using taxonomies, that I have hoped to see for years, are now becoming everyday realities."

Taxonomy Boot Camp London at a glance:

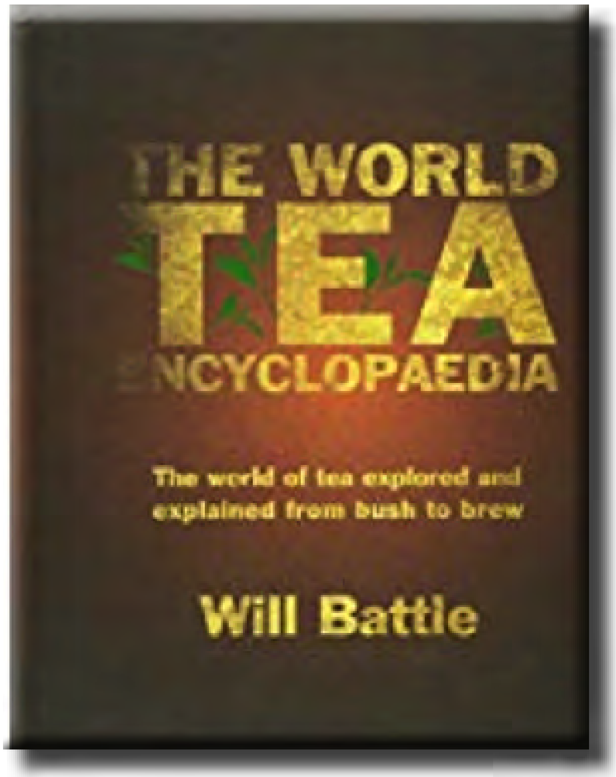
- Europe's only dedicated annual conference for taxonomy practitioners
- Two days of talks covering every aspect of taxonomy management; from making a business case to long-term maintenance
- Full day of pre-conference workshops for an enriched learning experience
- Hear about technologies such as machine learning and AI
- Special sessions on enterprise search and information architecture
- Inspiring case studies from government, charity sector, banking, publishing, research, and more
- Meet the experts for world class taxonomy advice, analysis and guidance
- Talk to vendors of market-leading taxonomy solutions
- Plenty of networking with peers in a lively, friendly atmosphere

Taxonomy Boot Camp London
16-17 October 2018, Olympia London
(Pre conference workshops on 15 October 2018)

CILIP K&IM members can claim a 25% discount when registering for Taxonomy Boot Camp London. Enter priority code KIM25 at
http://www.taxonomybootcamp.com/London/2018/

Tea Break: The World Tea Encyclopaedia by Will Battle

Ralph Adam



In a recent episode of The 3rd Degree, the BBC quiz in which dons compete against their students, the students were asked a basic question about tea – none had a clue as to the answer. That's, perhaps, a sign of how our love affair with tea has softened. Even the Tea Council, a major information source on tea, has evaporated.

Tea comes from the tea bush, Camellia sinensis, of which about 3,000 varieties exist. It has been grown in China for over 2,000 years, first as a medicament, then as a thirst-quencher and stimulant. The story goes that tea was discovered by Emperor Shen Nong. He was enjoying his habitual cup of boiled water by a tea bush one day when some leaves fell into his drink. He liked the taste, made it his regular drink and soon tea became everyone's favourite. Unfortunately, the Emperor's reign came to an abrupt end when he sampled another plant to test if it was poisonous. It was!

First known as the 'China drink', tea became popular in Britain with the upper-classes after Catherine of Braganza married Charles II in 1662. She brought her love of tea with her from Portugal; as a result it soon became a highly desirable luxury product imported by the East India Company whose initial business model was to swap it for

opium. Later, the company took to stealing tea plants from China for cultivation in India. Even so, not everyone in Britain knew what to do with tea: some tried soaking the leaves and eating them, while others ate them on toast with butter. Now, about 1,500 different teas (for drinking!) are available in Britain, varying in taste, style and colour.

For Lewis Carroll's Mad Hatter it was always tea time. But now, while tea is still Britain's most popular hot drink by far, it is rarely made for its flavour: brewing takes time. Buying a decent cuppa, certainly in London, is becoming increasingly difficult: tea shops have virtually disappeared. To be drunk properly, tea requires an element of ceremony. A recent Mintel survey found that while men aged 16 to 44 are Britain's biggest tea drinkers, they are not inclined to go for either atmosphere or quality.

Coffee drinking is promoted as an indulgent, crafted, connoisseur experience with an element of technology. This has led people to look for the same style in tea, but without the traditional emotional and ceremonial links. Standard black tea has an 'uninspiring' image; unlike coffee, tea is rarely visible in the media: in plays or serials 'having a coffee' is the thing.

The Mintel report shows sales of ordinary British tea bags to have dropped 13% over five years, while the fashionable fruit and herbal tea market grew by 31%. Sales of traditional accompaniments, such as cakes and biscuits, have also fallen.

With such a long and complex history as tea's, where can one find a detailed reference source?

The first encyclopaedic work on tea was that of Lu Yu, the Tea Sage, in AD 780. Other explorations of the drink have appeared since then. However, the idea of a modern tea encyclopaedia was born a decade ago. The man behind it, Will Battle, a professional tea-taster, importer and consultant, has spent his life in the tea trade, partly as a Tetley's taster - a job he describes as "the best in the world"!

Like Lu Yu's encyclopaedia, this is the work of a single author, not a panel whose contributions are brought together by an editor or compiler. Unusually for a reference book, Battle decided to self-publish, rather than use a conventional publisher.

Battle, a long-time student of wine atlases and guides, spotted the need for a similar work on tea. There was clearly room for someone who has seen all the world's teas to put that knowledge into a book. The result: an ambitious guide, probably the best reference work on tea to have been published in a century. It holds a vast amount of information, the climax of years of preparatory work and exploration. Readers are shown that there is life beyond the pound shop tea bag! Battle describes the book as part of a 'mission' to tell tea's story and "showcase flavours from around the world in the hope of fighting back against the rise and rise of coffee". As the subtitle suggests, it covers everything from 'bush to brew'.

The author introduces us to a wealth of tastes and varieties (many unknown in Britain). He covers tea's origins, from the landscapes and climates that influence varieties to its preparation, drinking styles and ceremonies. Battle explains how the global demand for tea has shaped where it is grown and how it is traded. He attempts to debunk the 'snobbishness and doctrine' that can scare off newcomers, pointing out that everyone has heard of Darjeeling ("the Champagne of teas") and Assam. But, he asks, "who

knows that there's this fantastic tea from the Thyolo district in Malawi or that you can get a really exciting Oolong from a particular part of Indonesia?" For Battle, the 'hero' of this book is the tea bush. The artisans who 'craft' it into myriad forms he sees as the supporting dramatis personae.

The flavours of teas, like those of wines, depend on where they have grown as well as on the soil and type of bush. Battle uses similar language to that of wine writers. For example, he sees Kenyan blends as being "clean, well-made and reliable, characterised by a quick-brewing, astringent nature with a brisk-tasting style that lacks the complexity, smoothness and refinement of the best orthodox teas".

The packets sold in shops are often blends of different origins with Kenyan currently the most popular element in the well-known packs. Battle thinks that only recently have people begun exploring the wide variety of available teas. "The diverse array of tea from across the world that is available at the click of a mouse or a visit to the local tea shop needs to be better known and understood," he says, hoping that his book will enhance the reader's enjoyment of what is, to him, a lovingly-created artisanal product.

Flip open the book's cover: the first thing you see is a fascinating front endpaper. For commercial book designers it is fashionable nowadays to surprise readers with creative, pretty endpapers. Here, however, the book opens to reveal a highly-coloured 'flavour wheel', acting as a sort of contents list-cum-index. This is designed to help readers identify teas that may appeal to them. The wheel is divided into four colour-coded levels: so if you seek a dark, fruity, mandarin-scented drink it directs you to Nigiri on page 234.

One expects at least a few minor errors in such a book, but the content in this volume is of very high quality, beautifully illustrated with photos of plantations, pickers and bush types on virtually every page (the page numbers are even enclosed within images of tea leaves!). Detailed tables of, for example, tea grades accompany the text.

The book has a narrative style: the story opens with an exploration of tea's origins (growing and picking, how a factory works and the different types of leaf). Social and environmental issues, such as pickers' poverty, biodiversity and the impact of fossil fuels are covered, but not in detail: thus, while Darjeeling gets a detailed account of why it is highly-valued for its delicate taste, little is said of recent local unrest, plant disease and fraud, all of which have contributed to reduced harvests and more being sold than is actually grown.

The second part focusses on drinking, going from how tasters work, to the many blends, brews and rituals to be found around the world. The bulk of the book, however, is an analysis of the tea industry in the countries where it is grown, ranging from the most familiar, such as China, India and Kenya, to those making for tough quiz questions (Argentina, Azerbaijan, Madagascar and Scotland are examples). Battle is strongest on the Sub-continent and Africa, less so on China ("the most difficult .... to comprehend" he says) and east Asia.

Each county, region or state briefing contains a short history of local tea-growing together with geographical descriptions, explanations of tea types and highlights of local features. In most cases, there is also a feature box summarising such elements as plant types, terroirs, seasonality, processing methods and styles of drinking. There are detailed, high-resolution maps (by Jamie Whyte) of virtually all the producing areas, showing the location of estates, gardens and factories. The Introduction claims that the mapping is the most detailed ever created. However, roads, railways and villages have been omitted for clarity: I found both this and the colouring (mostly shades of green) made the maps difficult to follow.

The Encyclopaedia concludes with a five-page glossary, selected references and an index. The Glossary is valuable, but ‘everyday’ terms such as ‘orange pekoe’ or ‘fannings’ are omitted. Yet, how ‘everyday’ are such terms to non-experts? This is, after all, an encyclopaedia.

As a reference work, this encyclopaedia is not designed for quick ’look-ups’. Information snippets are hard to find and it won’t work for fast fact-checks such as: ‘what is Georgia’s annual tea output?’, ‘who are the main British distributors?’, ‘can tea bags be recycled?’ or ‘which country has the highest annual consumption? (Turkey: 7lb per head). The answers may be there, but unless you are very familiar with the book’s structure, you will have to search for them.

Space is obviously limited but there are noticeable omissions. For example, Orwell’s famous essay A nice cup of tea is quoted, but his questions on etiquette (Why is it vulgar to drink from the saucer?) and ‘subsidiary uses’ (telling fortunes, feeding rabbits, healing burns and sweeping the carpet) are not. Similarly, local customs (such as the Chinese use of tea as a floor cleaner) are not to be found.

The roughly 850-item index presents difficulties: it has too many broad entries for swift retrieval. For example, ‘India’ gets 37 undifferentiated page references (including one to a 30-page chapter), but few sub- or cross-references to individual teas. Conversely, the main entry ‘Darjeeling’ gives 43 page references. A searchable digital edition might be the answer!

This volume reads more like a monograph than a traditional encyclopaedia. But if you forget that this is an encyclopaedia, you have a fascinating, well-written book, packed with information which warrants a place in any library. As well as at the Mad Hatter’s tea party.

The world tea encyclopaedia: the world of tea explored and explained from bush to brew.
Will Battle
Troubador Publishing, 2017.
397pp. £30 (£20 through Troubador with discount code CUPPA). ISBN 10: 1785893130; ISBN 13 9781785893131
A free download is available at: https://worldbooks.me/browse/the-world-tea-encyclopaedia/

Diary Dates Autumn 2018

Wednesday 3 October 2018 @ 9.30am-5pm at CILIP HQ

Building Your Career Using Transferable Skills

Join CILIP Knowledge & Information Management Group (London and South East) for a day to reflect on your library and information career and explore how you can transfer to other roles and environments. This workshop will be led by Erica Sosna, career coach and author.

Cost: (including lunch, refreshments, workbooks):
£50 + VAT CILIP members | £60 + VAT non CILIP members

Register now

Monday 8th October 2018 @ 14.00 – 15.00

BSI webinar: Unlocking the value of knowledge: Introducing BS ISO 30401 – the new international knowledge management standard

Knowledge can be an incredibly valuable commodity – but to make the most of it, organizations need the capacity to unlock and harness its power. To help you do that, we're about to launch BS ISO 30401:2018 – the world's first international knowledge management standard. Presented by the UK experts who sit on ISO's Knowledge Management committee, this is a unique opportunity to learn what the standard covers and how it could contribute to your organization's success.

Register now

Wednesday 10 October 2018 @ 9:00 to 16:30 at CILIP HQ

Knowledge & Information Needs Analysis.

Presented by Dion Lindsay, Real Knowledge Management.

As an information professional you know that every £ spend on information services is closely scrutinised and user expectations and needs are constantly changing. Knowledge and Information Needs Assessments (KNIAs) have never been more valuable. Attend this dynamic one-day training and come away with new skills to make every £ count for your organisation.

£180 + VAT CILIP members | £200 + VAT non-CILIP members

Register now

Tuesday 16 October and Wednesday 17 October 2018, Olympia London

Taxonomy Boot Camp London

(Pre conference workshops on 15 October 2018)

CILIP K&IM members can claim a 25% discount when registering for Taxonomy Boot Camp London. Enter priority code KIM25 at

Register now

Thursday 30 October 2018 @ 17:00 GMT

Webinar: Creating infographics – a beginner's guide

Presented by Denise Carter, DCision Consult.
Free to members of Knowledge and Information Management SIG
Register now

Wednesday 12th December 2018 from 17:00 at CILIP HQ.

K&IM Awards Evening

Guests include David Gurteen and Valerie Nurcombe joint 2017 K&IM Award Winners, Dr Ray Lester (editor of The New Walford Guide to Information Resources, 2004), Professor Sheila Corrall, Pittsburgh University, Nick Poole, CILIP CEO and Karen McFarlane Chair of the CILIP Board. Join us for cocktails and a fun and entertaining evening celebrating all things knowledge and information management!
Register now

SCOOP (the Standing Committee on Official Publications) is proposing to hold an Official Statistics Training Day, date and cost tba,
depending on demand.

- Are you interested in attending such an event, and thereby improve your knowledge and expertise on this most important area of
- information provision and K&IM?
- Could you speak on an aspect of official statistics, or do you know someone who could (doesn't have to be a LIS / KM person.)

If so, please contact Steven Hartshorne, Secretary of SCOOP,
Email: Steven.Hartshorne@bolton.gov.uk