

***Consultancy and Contract Work
in the Information Industry***

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Abstract

The information industry within New Zealand covers a wide range of disciplines. A study has been conducted on the contracting and consulting sector of a group of closely allied fields: librarianship, records management, archives, information management, and knowledge management. The three main objectives of this study are to

- take a 'snapshot' view of this sector as it exists today
- identify common concerns and issues amongst this sector
- see whether parallels can be made with similar surveys conducted in other countries.

Very little has been written on the contracting and consulting sector of this particular grouping of disciplines. Two studies that share some common ground with this study are Frey's 1985 study on information consultants and brokers in Australia and Warr's 1992 study on information brokers and consultants in the United Kingdom. No studies or publications have been found that specifically cover the New Zealand experience in this sector.

The results of this study show that there are many similarities and overlaps among the fields of librarianship, records management, archives, information management and knowledge management. The types of work undertaken, the methods of operating, and the necessary skills and attributes required for this type of work are common throughout this group.

Areas in this sector where a high degree of commonality is found include qualifications and education, experience, methods of locating work, skills and attributes needed, form of business operation, use of professional standards and codes, and need for professional development and support. Areas where this sector has a collective 'voice' concern the skill and attributes necessary for success in this type of work, the best and worst aspects of being involved in this type of work, and advice the interviewees they would give to people considering entering this arena, to others already involved in the sector, and to

current and prospective employers and clients. These similarities are not necessarily confined to the specific disciplines examined in this study, but are more representative of contractors and consultants of *any* discipline.

Several recommendations resulted from the findings of this study. The most notable of these identified the need for a single directory of consultants and contractors working within these information fields. Consideration could be given to establishing an association of information management consultants in New Zealand, although there is already a wide range of associations for the disciplines involved. An alternative is to establish a special interest group within one of the existing associations. A need has also been identified to promote greater awareness of standards and codes relevant to consulting and contracting in these fields. The recommendation is made that further surveys be run, to gather fuller data on some aspects of work in this sector, or to obtain quality comparative data.

The overall conclusion of this study is that those who operate as contractors and consultants in the fields examined have much in common with one another, even though several disciplines are involved in the field. Their work, experiences and methods of operating are closely aligned. There is a tendency for contractors and consultants to cross the traditional boundaries of their original speciality into other areas and to take on an increasing range of work. In this rapidly changing industry, much can be gained by looking further afield and combining the successful elements of discipline-specific knowledge with that of wider consulting and contracting experience.

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Consultancy and Contract Work in the Information Industry

Introduction

Within New Zealand's information industry is a sector providing contract and consultancy services. One of the groupings of disciplines within the wider information industry consists of closely allied fields: librarianship, records management, archives, information management, and knowledge management.

Very little has been written on the contracting and consulting sector of this particular grouping of disciplines. Only a handful of studies from overseas, including Frey's 1985 study on information consultants and brokers in Australia and Warr's 1992 study on information brokers and consultants in the United Kingdom, have looked at this group. No studies or publications have been found that specifically cover the New Zealand experience in this sector.

The purpose of this study was to gather information about those who are operating as contractors or consultants within these five disciplines and to determine from this information the size, nature and experience of contract and consultancy work in the information industry in New Zealand today. The three main objectives were to

- take a 'snapshot' view of this sector as it exists today
- identify common concerns and issues within this sector
- see whether parallels could be made with similar surveys conducted in other countries.

This study also sought to determine whether there is a strong link between the work practices and experiences of contractors and consultants in New Zealand and those of other countries. No direct comparisons were made with contractors and consultants in other disciplines.

The most effective way to gather information about the people operating as contractors and consultants is to ask them directly about their work practices and experiences. Thus, a survey of those currently working in the sector has formed a core part of this study. Other research methods, including a review of the literature, have also been included.

Other publications resulting from this study are listed at the end of this working paper. They comprise two articles and a conference paper, each looking at a particular range of aspects arising from this research. This working paper contains the full result of the research and is the only place where all of the data is located together.

Literature review

Introduction

A review of the literature was conducted, which established that, although many items discuss aspects of consultancy and contract work in operation, only a few discuss or analyse the overall consultancy or contract market. The few that bore the closest resemblance to this study were studies conducted overseas. However, many of these are several years old, and the nature of this work in a rapidly changing field means that the results of these studies may not have a close correlation with the current study. Other examples of writings found in the literature included overviews of the contract and consultancy market and papers giving specific details, practices and advice for interested parties. There appears to be something for everyone interested in this area, whether they are observing it, considering working in it, or already actively involved. The literature fell into several distinct groups: studies of the group as a whole, the industry, tools, skills, and services, directories of the profession and personal perspectives.

Previous studies

Several studies have already been conducted in this sector, establishing a profile of information consulting or contracting businesses in a range of countries. The most notable of these are Frey's survey of information consultants and brokers in Australia, conducted in 1985¹ and Warr's *Paying for Business Information*, a survey of United Kingdom consultants and brokers, conducted in 1991.²

Frey's study looked specifically at broking and consulting businesses in terms of

resources used, the client base, capitalisation, number of staff — their qualifications ... means of receiving requests for work, use of subcontractors ... and finally, views on attributes required for success in the area, and consultant/broker views on the future of the area in Australia.³

Frey states that there is no 'umbrella term that can be used to describe this group of brokers, consultants and contractors,'⁴ but it is clear by the services provided by this group that it encompasses librarianship, research, records management and information management.⁵ One of the main objectives of the study was to identify areas for continuing education for this and the wider information context and to identify other areas for future research.⁶

Frey's study confirmed many of the trends that were discovered in both the Maranjian and Boss and the Kelson reports in the United States and Victoria respectively.⁷ The researchers faced the same difficulty in defining the group they were looking at, as consultants and contractors work across the more traditional boundaries of librarianship, records management and related areas.

Frey's study found that the information enterprises fell into three main areas of service: 'broking, literature searches, etc; contracting, the provision of skilled labour, for example; and consulting, the provision of expertise'.⁸ Individuals and businesses often cross these divisions and provide services in more than one area.

Other areas in common with the current survey include the level of prior experience and qualifications of those operating in this sector, reasons for entering the sector, and marketing methods. In addition, Frey looked at clientele, pricing and billing strategies, advantages and disadvantages of this type of work, and attributes needed for success.

Overall, this survey has the closest correlation with the current study, as several of the questions and interest areas are similar and it was conducted in a similar area of the globe. However, the age of the survey means that many of the influencing factors governing this sector may have altered. The survey results are shown in full, but the discussion and analysis of the results is somewhat thinner. Frey's study was not all-encompassing, but it does provide a good glimpse of the sector in Australia at the time.

Warr's study focused on United Kingdom information brokers who provide services to the business community. The main aim of this study was to

provide an overview of UK information broking services ... This involved identifying traits among information brokers, i.e. number of years in business, geographical location, number of clients, types of services, charging systems etc. ... it was hoped that the data collected would highlight whether there are any gaps in business information provision by information brokers, and/or whether there is any link between the establishment of information brokerage services and the state of the UK economy at that time.⁹

Warr's study also determined that 'Definitions of who or what information brokers actually are remain varied as does the terminology to describe them, eg, information consultant, freelance librarian, fee-based service, etc'.¹⁰ A general description of the group operating within this sector was developed, based on the questions asked in this survey.

Warr's study concluded that the sector was still new and growing and included information brokers and consultants, many of whom were involved in fee-based information services within larger institutions or organisations. Warr's study had some commonality with other surveys, finding that 'word of mouth' and 'client recommendations' were the best marketing devices but were most effective when used in conjunction with other means.¹¹ The essential attribute listed was that of interpersonal skills. The information-broking industry was seen at that stage as a growth industry, although it was thought that the 'information maze'¹² may over time become less complicated, thus reducing or eliminating the need for information-broking services.

Overall, this survey was more detailed in its questions and analysis than the survey conducted by Frey. It addressed several important areas for consultants and fee-based information providers in the United Kingdom at the time but has perhaps less correlation with the current survey than the one conducted by Frey. Warr's survey is an important landmark in the description and analysis of this sector of the information industry and remains useful for those in the United Kingdom, although it, too, is becoming quite dated and less relevant now that the market has changed and developed further.

Previous studies in this field are plentiful, but they are either older or focus on different aspects of contracting and consulting in the information management field. Examples include the studies of Debons,¹³ who looked at numbers and types of information professionals employed in the United States in the early 1980s, Maranjian and Boss,¹⁴ who surveyed fee-based services, and Broadbent and Kelson,¹⁵ who looked at information brokers in Victoria in the early 1980s. Little seems to have been conducted more recently, and nothing was located within New Zealand.

The shape of the industry

Some general industry overviews of contracting and consulting work have been published, most of which look at a specific geographical area or a specific service. Examples include Lowther's 1999 article, *Information Consultants & Contractors in New Zealand*,¹⁶ which gives a broad overview of this sector within the fields of librarianship and records management and discusses what these consultants and contractors offer, how to find them and what results to expect. Another is Paul's article *Establishing an Information Consultancy in Australia*,¹⁷ which looks at the equivalent Australian sector and discusses why people enter it and how they operate within it.

These provide a context for those working in this sector, showing how the sector works as a whole and ways of operating within it.

Tools, skills and services

A range of working tools, skills and services for contractors and consultants also feature in the literature. Tools are included in the *Code of Practice for Information Brokers*,¹⁸ which offers guidelines for operating within this sector. Skills and services are included in Morrow's *Keeping Your Ear to the Ground*,¹⁹ which looks at the range of essential skills needed by today's information professionals. There is also a wide range of articles dealing with particular services being offered by contractors and consultants in the information arena. These provide some good initial ideas and reference points for the qualities and skills needed and tradable services that have been utilised by others and found to be successful.

Directories of the profession

Several directories of information consultants have appeared in recent years, which provide an invaluable resource for this sector. Many of these relate to particular countries and are either commercial listings or are issued by professional bodies.

Of the current listings available around the world, those most widely used include the *Burwell World Directory of Information Brokers*,²⁰ which began as a United States listing and is now an international directory, the Information Industry Association's (IIA) annual membership directory, called *Information Sources*,²¹ the *Directory of Information Brokers and Consultants*,²² based in the United Kingdom, and the Australian Information Management and Consulting Association's *Information Consultants, Freelancers and Brokers Directory*.²³ There is currently no single New Zealand listing, although a selection of consultants and contractors can be found at the Library and Information of New Zealand Aotearoa (LIANZA) website,²⁴ and others are available on the Association of Records Managers and Administrators (ARMA) Wellington Chapter website.²⁵

Personal perspectives

The literature also has many articles and other items featuring personal perspectives of working in this sector. Examples include Hopkins' *Working as an Independent Contractor*,²⁶ giving practical and sensible advice on how to work successfully in this area, and Dobbie's *Working From Home is Like a Chocolate ...*,²⁷ which looks at the pluses and minuses of working from home. These personal perspectives provide an insight into the practicalities of doing contract and consultancy work.

Summary

Although there is a wide range of items available in the literature, little of it comes from New Zealand. In most cases, ideas and experiences need to be compared with overseas sources. A general picture of the consultancy and contracting sector of the information arena can be drawn from the range of items located in the literature. However, since little of the literature comes from New Zealand, it provides overviews and insights that have varying levels of significance for those working in these sectors in this country. It is hoped that, over time, there will be a growth of literature in this area coming from New Zealand.

The New Zealand scene

Introduction

The size, structure and nature of the New Zealand market are likely to influence the way consultants and contractors operate in this setting. The areas most likely to have an influence include

- the size of the market
- its geographic location
- existing organisations and structures, including agencies and professional associations.

Population

New Zealand currently has a population of around 3.8 million. It is about one fifth of the size of Australia and approximately the size of Sydney. The population of the greater Auckland region in 2001 was around 1.2 million and of the greater Wellington region was 350,000. The spread of New Zealand's population indicates that the most likely places for consulting and contracting work to occur is in these two main centres, with potentially less work available in smaller centres. The amount and type of work available may be influenced by the size of the centre and the nature of work being conducted there. This aspect is investigated more fully in the survey.

Size of the industry

The number of consultants currently working in these fields is more difficult to determine. For this study, conducted in New Zealand in 2001, 36 candidates were identified and 26 of these were interviewed. In Frey's study along similar lines in Australia in 1985, 62 candidates were identified, and 38 of these replied to the survey. In 1984, Broadbent and Kelson identified 36 individuals and seven businesses operating in the Australian state of Victoria.²⁸ New Zealand's contracting and consulting sector is a similar size to that of Victoria in the mid-1980s.

Nature of the market

Most employment in these areas comes from local and national government, the education sector, commercial businesses, and a range of business and private organisations. New Zealand has no major agencies that deal in the services of recruitment, placements, and temping within these information services. Some small businesses deal with recruitment and placements on an *ad hoc* basis, but there is currently no major temping or placement service that connects work in these areas with those seeking it. A number of other methods are used to advertise and locate work, and this aspect was also incorporated into the survey so that more information could be identified. The need to locate their own contracting work places contractors in a similar position to consultants in this respect. For both contractors and consultants in New Zealand, work is generally sought and won on the open market, and features such as reputation and self-promotion are part of the business.

Professional associations

New Zealand has several professional associations covering the areas of librarianship, records management and archives, and these are mirrored to a large extent by similar associations in Australia. New Zealand has LIANZA (Library and Information Association of New Zealand Aotearoa) and Australia has ALIA (Australian Library and Information Association). The NZLLG (New Zealand Law Librarians' Group) is mirrored by the ALLG (Australian Law Librarians Group). Both countries have ARMA chapters (Association of Records Managers and Administrators) and sections of the RMAA (Records Management Association of Australia); New Zealand also has ARANZ (Archives & Records Association of New Zealand). The New Zealand Society of Archivists mirrors the Australian Society of Archivists.

Although the range of professional associations is similar, there are differences in size. For example, LIANZA currently has around 1430 members, counting both personal and institutional members. ALIA currently has around 7000 members, with just under 6000 personal members and around 1000 institutional members. Thus there is a sizeable difference in the scale of operations between New Zealand and Australia.

Summary

Although there is a difference in the size of New Zealand's and Australia's population and information industries, the type, nature and conduct of contracting and consultancy work in these fields are similar in both countries. These similarities allow some effective comparisons to be made between the two, despite the size difference.

The survey

Introduction

The survey of contractors and consultants was the main source of information for this study. The aim of this survey was to identify the key areas of commonality and concern amongst the group of consultants and contractors working in these fields. Owing to the absence of a wide body of literature on the subject and the anticipated wide range of people and potential answers, a direct survey of those involved was chosen as the method to collect this data.

Methodology

A list of areas of interest was drawn up and refined into a survey questionnaire. A copy of the questions asked during the interviews is included in the Appendix.

Potential interviewees were identified from a number of sources. They all had to be contractors or consultants currently working in one of the five fields included in this study. Given the absence of a national directory or listing of the people involved in this line of work, identification was not easy. Our sources for identifying contractors and consultants working in these fields were varied and included

- LIANZA website listing of library consultants in New Zealand (including several contractors):
<<http://www.lianza.org.nz/consultants.htm>>
- ARMA Wellington chapter website listing of consultants:
<<http://home.clear.net.nz/pages/arma.wgtn/Consultants.htm>>
- NZ-Freelance listserv:
<nzfreelance-subscribe@listbot.com>
- Advertising noted in industry journals
- *Telecom Yellow Pages*
- Industry knowledge and contacts

These sources identified 43 possible candidates, of which 36 were within the scope of this study. Twenty-six people were interviewed. Of the remainder, three were not interviewed because they were too busy to participate in the study or there was no time that suited, and seven did not respond to emails or phone calls. This gave a response rate of 72.2 per cent for the survey.

The survey itself was conducted over 3 months in mid-2001 and consisted of one-to-one interviews with practitioners, conducted in person where possible, and by phone when necessary. There was also one email interview, as neither a meeting nor a phone call was viable. Conducting the interviews in person or by phone meant that questions could be discussed if necessary, and impressions could be gained that would otherwise be difficult to obtain. Interviewees were all contacted initially by email, with a follow-up phone call if no email reply was received. Times were then arranged for the interviews to take place. Each interview took about 1 hour to complete and gave each contractor or consultant the chance to give their views, ideas and experiences on a wide range of topics. Most of the questions were deliberately open-ended so there was a great deal of material gathered during these interviews.

Findings and discussion

The people

The interviewees

Of the 26 people interviewed, 84.6 per cent were female and 15.4 per cent were male, confirming the pattern of more women than men holding these professions. Sixteen of the interviewees worked in Wellington, six were based in Auckland and five in smaller centres around the country. The concentration of contractors and consultants in the main centres of the country is consistent with the findings of Warr's 1992 study. United Kingdom brokers were also found to be concentrated in the main business centres, particularly London and the South East.²⁹

Qualifications and Education

The formal qualifications of contractors and consultants ranged considerably, although almost all (96 per cent) have tertiary qualifications in their particular discipline and many have other areas of expertise as well. Although not everyone gave specific details in answer to this question, 21 of the 26 people interviewed indicated they have at least a Bachelor's degree, and 22 higher degrees or postgraduate diplomas were listed amongst this group collectively. The higher degrees, including a doctorate, were in the fields of librarianship, archives and records management, business administration, public management, New Zealand history and teaching. Other qualifications tended to be specifically focussed on the type of work, the most common being library studies certificates and diplomas and certified records manager qualifications. This level of academic qualifications is consistent with Frey's 1985 findings in Australia. Frey found that both her study and Kelson's 1983 study revealed that most operating in this sector had a degree of some kind, and many of these were at the Master's or postgraduate level.³⁰ Warr's 1992 study also found that those working as information brokers generally possess relevant information qualifications,³¹ but does not specify the exact nature or level of these.

Experience

Interviewees were asked to briefly outline their work experience. The replies received showed that all contractors and consultants interviewed have a strong background in their particular field or a related discipline, with substantial work experience in librarianship, archives or records management. The total length of time each interviewee had been working in their field, counting both contract/consultancy work and salaried work, ranged between 10 and 40 years. This minimum of 10-years' experience, extending to a maximum of 40 years' in the information arena, shows that the people currently working within this sector have a great deal of experience to bring to their professional work.

Answers to how long they had been operating as a contractor or consultant showed a remarkably even coverage of length of service. The average length of time worked as a consultant or contractor is 7.3 years. The most common length of time is in the 3 to 5-year range, with other common lengths of time being 1 to 2 years and 11 to 15 years.

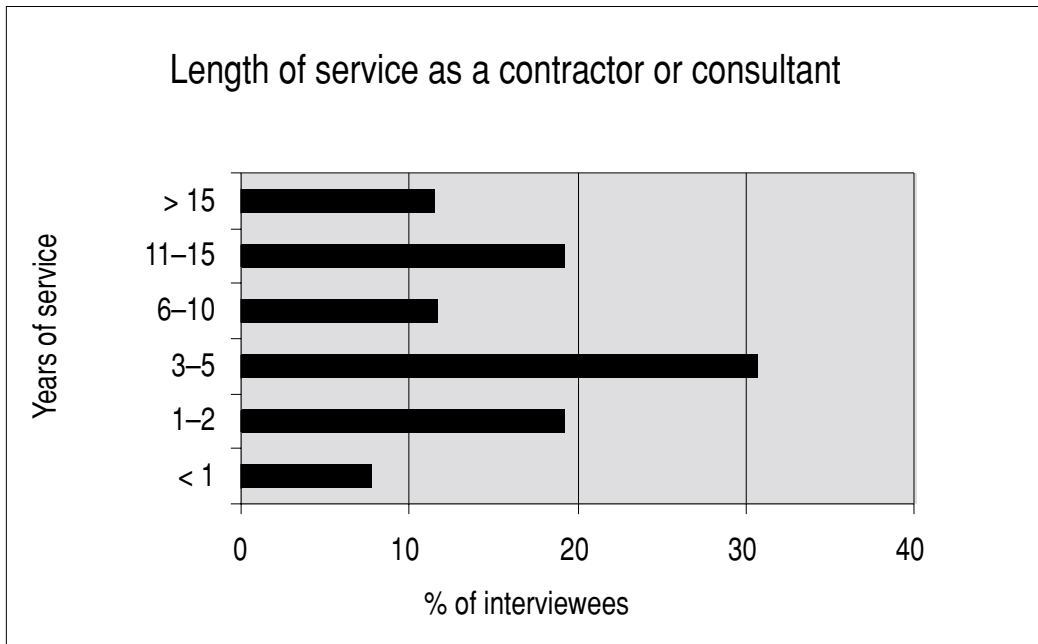


Fig. 1 Length of service as a consultant or contractor

The average length of time in this field of 7.3 years shows not only stability of occupation in this sector, but also the possibility of a long-term career for those who are successful or like the lifestyle options it provides. A steady progression of people are entering this sector, and many of those who enter appear to stay.

When compared with the data in Frey’s 1985 survey of consultants and brokers in Australia, a difference in patterns emerges.

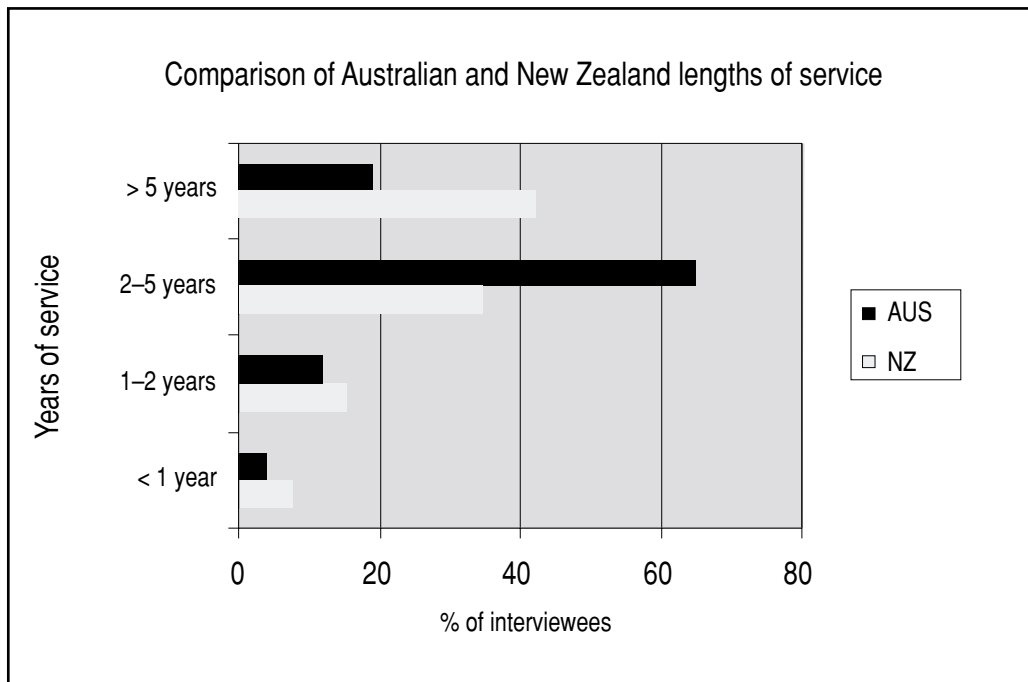


Fig. 2. Comparison of Australian and New Zealand lengths of service as a consultant or contractor

While people within New Zealand’s contracting and consulting sector appear more likely to stay in this sector once they have entered it, far more movement is shown in the Australian market. Here the most common length of services in the 2 to 5 year range, and it tapers off considerably after this. A number of factors may be responsible for this trend, including the amount of work available in each market, differences in the structure of the markets over time, different reasons for wanting to be in the sector, to name just a few. It may also be that the Australian sector was just establishing itself in the 1980s, so that its people did not have the same length of service in contracting and consulting as they may have now. Further data, such as a more recent Australian study, would need to be collected before the reasons could be fully determined.

The work

Type of contract or consultancy work and tasks

Interviewees were asked what kind of work or tasks they were usually involved in. The responses to this question showed a great deal of variety. About half of the interviewees said they work mainly within their own area of interest, such as cataloguing, indexing, records management consulting, KM strategies, locum work, training or research. Those who stay within their own field tend to be contractors or freelancers with specific interests or skills in those areas.

Warr's 1992 study in the United Kingdom found: 'The key services offered to the business community are research, current awareness, consultancy, document delivery and literature searching. Gaps in provision are translating services and cataloguing services.'³² Frey, in her 1985 study of Australian information consultants and brokers, found that there were three major categories of services being offered: 'broking, literature searches etc; contracting, the provision of skilled labour for example; and consulting, the provision of expertise.'³³ The core services provided by consultants and contractors in the current study seem to fit within these same categories, but some of the contractors, and more particularly the consultants, have found their work has extended beyond the traditional scope of their specific field. Skills such as project management, mentoring, fund securing and some types of research extend well beyond the boundaries of traditional librarianship, records management and information management.

One consultant observed that for her, the work is *varied as it is demand driven*. Tasks that some of the consultants are currently involved in include judging business awards, conducting organisational climate surveys, teaching through the Internet, creating databases, and co-ordinating consumer health information. The range of tasks available to these people seems to be constantly expanding.

Full-time or part-time occupation

The majority of interviewees working as contracting or consultancy staff in these disciplines indicated that they work full-time. Of the 26 respondents, 20 said that they work full-time as a consultant or contractor, and a further four that they work part-time because they choose to work only part-time and do not engage in any other form of work. One respondent combines consultancy work with salaried work, and one combines contract or consultancy work with studying for a higher degree.

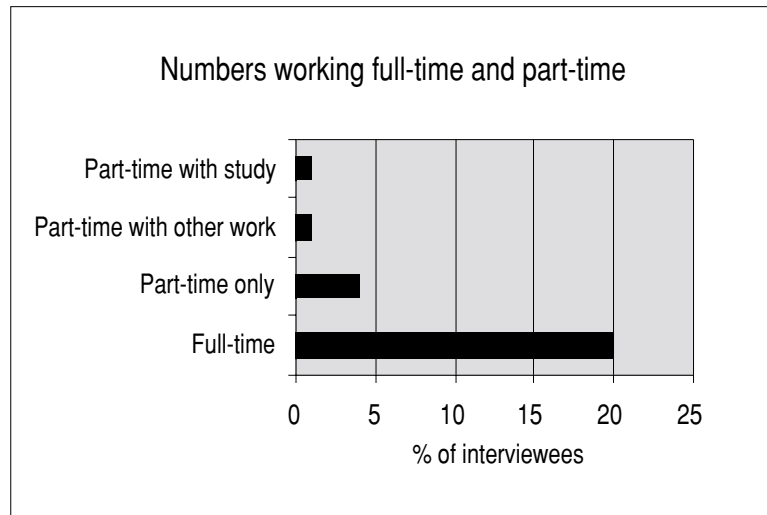


Fig. 3. Numbers working full-time and part-time

Contract or consultancy work is practised primarily as an exclusive form of work, with 24 respondents (92.3 per cent of those surveyed) indicating this is the sole kind of work they are currently involved in.

Although this question was expected to draw only 'yes' or 'no' answers, several respondents replied with details about the extent of their working hours. The most common comment was that contract or consultancy work is *more than full-time*, while a few noted that although this type of work is full-time, they are still able to choose *when they work and when they take breaks*. For this latter group, the flexibility to be able to choose full-time or less than full-time work is one of the advantages of being a contractor or consultant.

It is difficult to compare these results with Frey's, as Frey had asked individuals and businesses differently worded questions on this subject. Frey found that only 36 per cent of individuals considered themselves full-time while 64 per cent considered themselves part-time. She also found that 71 per cent of individuals had a supplementary income from other employment.³⁴ Although this pattern is quite different from that provided by the 92.3 per cent of interviewees indicating they work full-time as contractors or consultants in New Zealand, it is unclear what external factors caused this difference. More data would be required, perhaps in the form of a more recent survey of Australian consultants and brokers, before this could be determined.

Distinguishing between contract and consultancy work

Interviewees were asked, 'Would you distinguish between contract and consultancy work and if so, how?' The majority of responses did indicate a distinction. It was that, in its pure form, contract work is usually a specific piece of work or tasks done at the client's premises, often locum work, whilst consultancy is based on giving advice and assessments and bringing a professional opinion to an issue. Tasks were often seen as more wide-ranging for consultants than for contractors.

Several interviewees also indicated that another feature distinguishing these types of work is the pay rate. Consultants are thought to be generally able to charge more for services than contractors. It is interesting to note that this comment was made by interviewees across the board, whether doing solely consultancy or contracting or a combination of both.

Although most responses indicated a clear distinction between the two, a few commented that in practice there is a *blurring of the lines* between contract and consultancy work. In practice, it is often difficult to distinguish between the two, and when a variety of work is done, some tasks will fall clearly into one category while others cannot be so easily categorised.

Choice of specialty

Respondents were asked, 'If you had to align yourself with a single 'specialty', would it be: librarianship, records management, archives, information management or knowledge management?'. Several respondents selected more than one specialty, and several had different interpretations on what some of these fields encompassed.

Of the responses received, seven were for librarianship (21 per cent), three for records management (9 per cent), one for archives (3 per cent), 15 for information management (45 per cent), and 5 for knowledge management (15 per cent). There were also two specialties chosen that were not on the original list: one for research and one for project management.

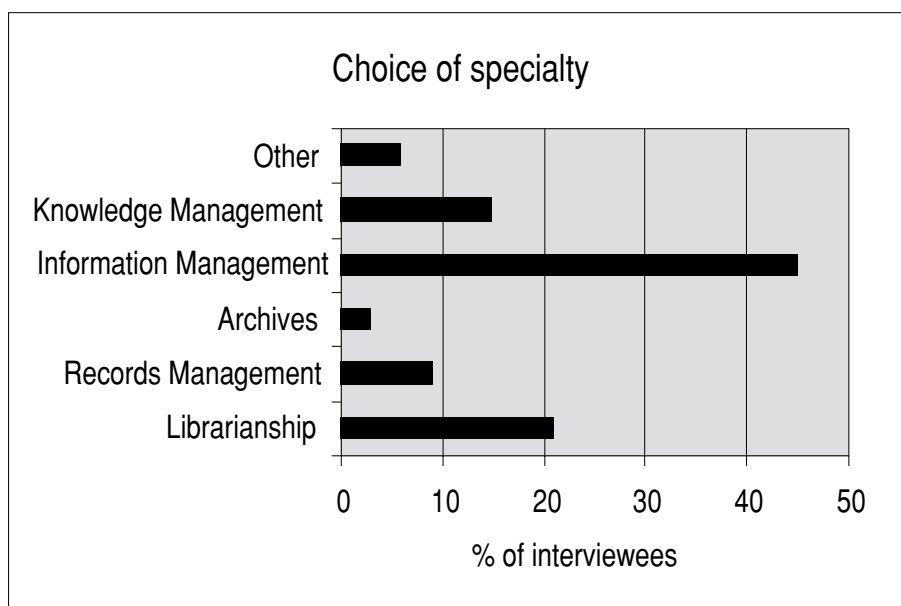


Fig. 4. *Choice of specialty*

An interesting point of these results is that when the description of the type of work respondents are currently involved in is compared with the types of task they usually do, the correlation is not very high. Although some kept firmly to their traditional area of expertise, many said their specialty is information management and went on to clarify their understanding of the term. For most interviewees, where more than one type of work is being done, a broader term such as *information management* is applied. Several interviewees indicated that for them information management in this context involves a grouping of records management, archives and information management. For others it is a grouping of librarianship and information management. One interviewee said that the term she identified most closely with was dependent on the client she was currently working with, and that the specialty can change over time.

Preferred job/position title

A surprisingly wide variety of job or position titles were given in response to the question concerning their preferred job/position title. Twenty-three different titles were given by the 26 people interviewed. While some interviewees prefer to use only one job or position title, several used multiple titles, according to the type of work being sought or done at the time, or the requirements or expectations of clients or employers.

Many of the titles seem to be chosen for their market effectiveness. A large proportion used titles that are more business-focussed than information industry-specific. A few had not thought about the position title they should be using, and had no firm ideas on what labels to attach to themselves.

The titles most commonly chosen are listed below, together with an indication of how many of the 26 interviewees frequently use these names:

- consultant (4)
- principal consultant (3)
- director (3)
- librarian (3)
- project manager (2)
- information management consultant (2).

The following titles were used by only one interviewee each amongst those surveyed:

- records management and archives consultant
- records manager
- freelance librarian
- library consultant
- researcher
- freelance researcher
- information broker
- information consultant
- consultant in library and information services
- Information management co-ordinator
- knowledge management consultant
- senior consultant

- freelancer
- event manager
- trainer
- problem solver
- manger — consultancy services
- manager — document management services
- supporting information professionals.

Many of these titles resemble others and can be interpreted as being the same, but it is interesting to note the absence of common titles being used amongst this group. The terms used to describe what is done by this sector is not yet established or conforming to any set pattern.

One interviewee who had not stated a preference for a particular job or position title gave an explanation that seemed to echo the voice of many: *The job title is determined by the client. If, for example, a client contacts me wanting to hire an information management co-ordinator, then that is what I am.*

An interesting comparison can be made between the preferred position title and the business name. This survey did not ask for the name businesses operate under. Owing to the absence of a major listing of businesses and operators in this area, it is not easy to determine. Frey's 1985 study did look at business titles and concluded 'Businesses are increasingly opting for business-type names rather than using individual names.'³⁵ This seems to be paralleled in the choices above for position titles. Both studies agree that professional image is perceived as important in the marketplace.

Reasons for choosing contract or consultancy work

Interviewees were asked why they chose to do contract or consultancy work in preference to salaried or other work. There was a wide variety of answers given to this question, and usually more than one answer per person. There seemed to be as many different answers to this question as there were people participating in these interviews. Replies generally fell into three categories:

- reasons for wanting to become a contractor or consultant
- reasons for wanting to stop doing whatever they were doing beforehand
- the conditions and lifestyle of this type of work.

Regarding reasons for wanting to become a contractor, the findings were mostly positive. The most common response was that by doing this kind of work, you could *be in charge of your own work*, have variety, freedom, independence, be *able to make your own decisions* and have *more control over [your] work environment* (five responses). Three said they particularly wanted to do project work, and three wanted the range of challenges and opportunities that this type of work offers.

Regarding reasons people wanted to stop doing whatever they were doing beforehand, several common themes appeared, some negative. The most common responses here concerned *not wishing to be involved in the politics of an organisation* (five responses), *wanting a change from salaried work* (four responses), and *having been made redundant* (four responses). The last of these was particularly interesting in demonstrating how redundancy was viewed. Two chose contract or consultancy work because they did not wish to be made redundant again; one felt *forced into it* after being made redundant; and one viewed redundancy as providing the *opportunity to do this kind of work*. Conversely, five interviewees said they were *offered this type of work and gladly accepted it*.

Regarding the conditions and lifestyle of a contractor or consultant, several themes again became apparent. Three took this option as a lifestyle choice, with its flexibility in hours worked and its potential for time off between contracts. One interviewee said part-time work was difficult to find at her level, so consultancy work was a viable alternative. Another said contract and consultancy work is good in that it allows you to *use your entire skillset*, and still others mentioned the *variety of work available*, working for a *range of institutions*, being able to *make a difference in a number of different places*, and *having the opportunity to travel*.

Frey's 1985 study confirms this with her findings that reasons for entering this sector were mixed but have 'an emphasis on people moving from other employment with the objective of realising variety in their work and a release from the demands of regulation office hours'.³⁶

The market

The New Zealand environment

Interviewees were asked if there were any factors unique to the New Zealand environment that provide advantages or disadvantages to their work as contractors or consultants. Many factors were mentioned, covering a range of themes. Interestingly, some factors were considered to be advantages to some and disadvantages to others.

The first theme that became apparent is the size of New Zealand. Many interviewees said that New Zealand's small size means that *everyone in the industry knows each other*, which is both advantageous, as it makes networking and building a good reputation very easy, and disadvantageous, as the industry can be *incestuous and competitive*. It was also noted that New Zealand does not seem large enough to support agencies that deal with placements in permanent and temporary vacancies in these areas.

Another theme that came through strongly was New Zealand's physical distance from the rest of the world. Again, this was seen as both an advantage and a disadvantage. The advantages included New Zealanders getting more work, as it is often too costly to bring in expertise from overseas, and the opportunity to exploit the time difference between New Zealand and the rest of the world to provide an overnight service to clients in other countries. Disadvantages of the geographical distance included having to travel overseas to attend conferences and meetings and the associated cost of that travel.

Other comments focussed on the people involved in consulting and contracting, and the infrastructure of this sector. Again, interviewees listed both advantages and disadvantages. Some of the comments related to size. One said, *The professional infrastructure and bodies are not politically or financially powerful enough to assist contractors or consultants*. Regarding the people, comments were made that there is a *lack of professional standards* and in some places a *lack of qualified, experienced people in the field*. Conversely, some find it easy to work in New Zealand because *if you do well in one place, you can get connections to do other work*.

Preferred sector

A range of questions were asked about the market in which these consultants and contractors operate. The first question asked interviewees if there was a particular sector in which they usually work. Figure 5 shows that a large proportion of those working as consultants or contractors work within a particular field and a smaller number have no particular sector preference.

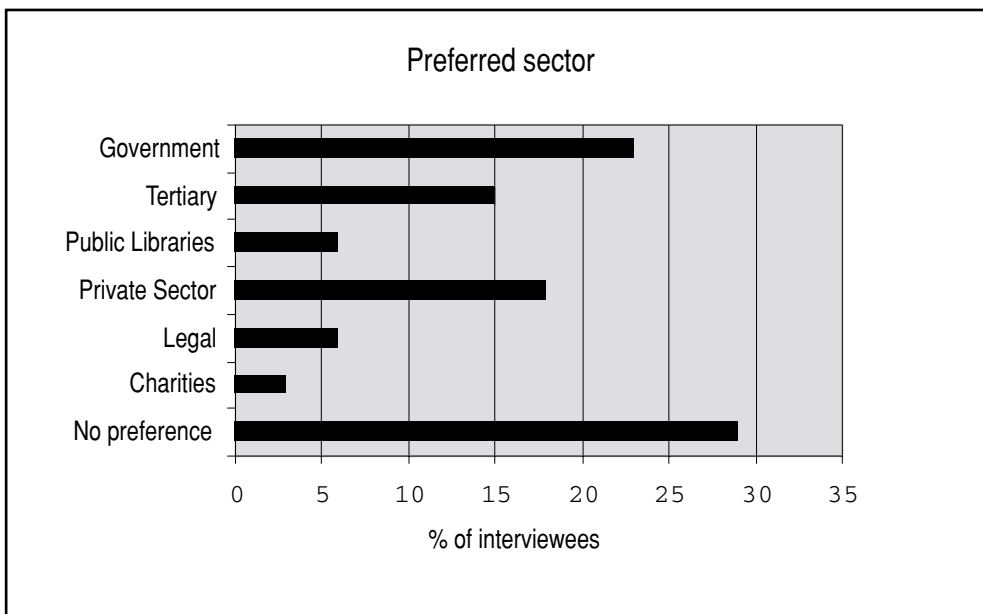


Fig. 5. Preferred sector for consultancy and contracting

Seventy-one per cent of interviewees indicated a preference for a particular sector. The highest concentrations of sector-specific work come from the government and private sectors. The type of specialty provided by these consultants and contractors may relate directly to whether they target their services to a particular sector, as well as the nature of the market in the area in which they operate. This relationship could be the topic of further study in this area.

Methods of locating work

When interviewees were asked about how they locate work, several commonly used techniques and avenues emerged and there was also a wide variety of less common methods. Results showed that some interviewees use a variety of methods while others rely mainly on one method. The most common methods are shown in Fig. 6.

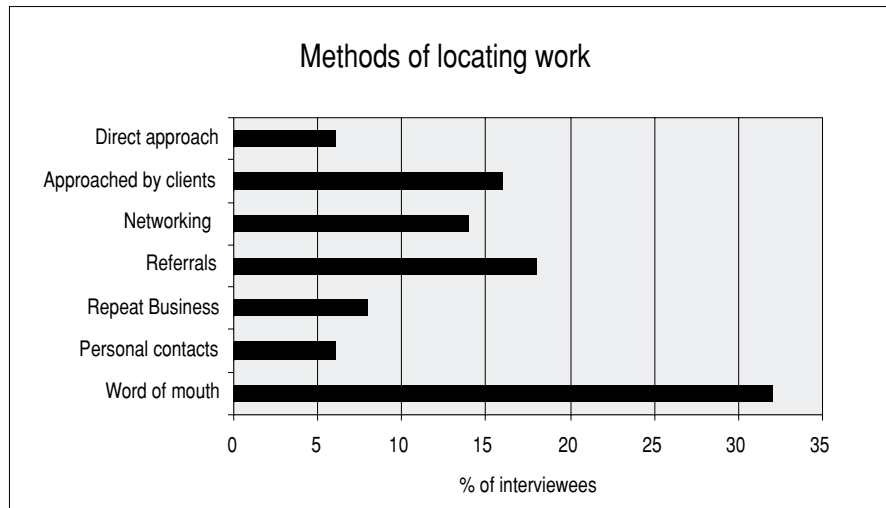


Fig. 6. Methods of locating work

Other methods, mentioned by, at most, two interviewees, included

- advertising
- direct marketing
- developing strategic partnerships
- being known within the industry
- answering advertisements on listservs
- using an agency
- sales reps
- tendering for work
- being on various registers
- being listed in directories
- going to speaker presentations.

One person quoted her mentor saying that, in terms of networking, she had *lunched her way up the food chain.*

There are several factors that explain this particular pattern of locating work. There are no widely used temping, contracting or consulting agencies operating in New Zealand that specialise in placements in these fields, although some are beginning to fill part of this niche now. A few private agents engage in some form of personnel recruitment services, but these tend to recruit for permanent positions rather than concentrate on contracting and consulting work. Another factor is New Zealand's small size, which allows networking and word-of-mouth systems to operate effectively.

Warr concluded in her study that a variety of marketing methods were used, and that although word-of-mouth and client recommendation were the best methods of marketing, they were not sufficient when used on their own.³⁷ Frey's 1985 study found that 50 per cent of those surveyed found word-of-mouth to be the most successful method of advertising and that brochures and professional meetings also ranked highly as means of marketing. Little other marketing was done on a collective or collaborative basis within Australia at that time, which still appears to be the case in New Zealand. The regular publication of a directory in some form may go some way towards remedying this.

Ease of locating work

Interviewees were asked if they found work easy or difficult to locate. Eighty-three per cent said they found it easy to locate work, with several commenting that there is usually more work than time to do it, and several have had to turn down work for that reason. Of the remaining people, 4 per cent said the amount of work is sufficient, 4 per cent find it difficult to locate enough work, and 9 per cent reported that finding work varies between being easy and difficult. Several commented that it was easy to locate work in Wellington, but difficult in other centres around New Zealand. A few people make use of down time between contracts for personal activities such as study, and some are happy to have breaks between contracts.

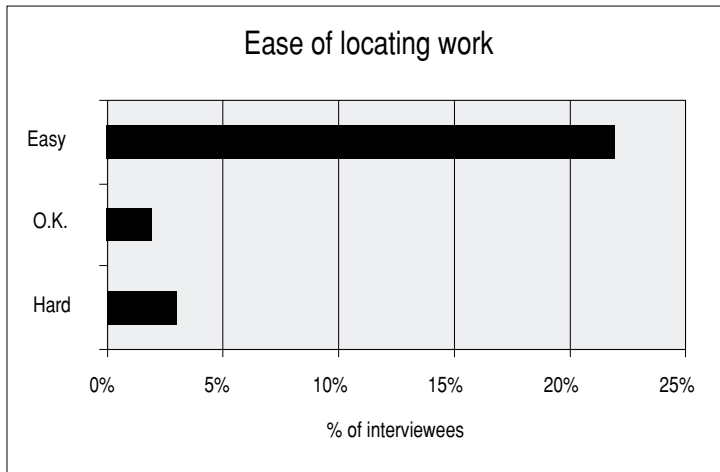


Fig. 7. Ease of locating work

Those who found it hard to locate as much work as they wanted fell into two categories: those who were specialising in a narrow field of work and were not prepared to work beyond that area, and those who were based in smaller regional centres, where work is scarcer.

Comments that were made in support of their choice of answer to this question show a degree of flexibility in managing times when work is plentiful and when it is not. One interviewee said, *There have been times when I haven't been able to find work, but I haven't been without work for any extended length of time.* This person also indicated that any down time is used for study and personal activities.

Several of the consultants indicated that there was a large volume of work available, with comments such as *I am constantly overwhelmed with the amount of work being asked of me.* There was also this common thought amongst several who worked outside the two main centres, *In ... [smaller centres] it is difficult, but in Wellington it is easy.*

These findings indicate that the ideal mix for locating a suitable amount of this type of work is to have a flexible set of skills and to be based in one of the two main centres.

Business practice

Form of business operation

Questions were asked about how the consultants and contractors ran their businesses. These questions covered the type of business operation, business name, and location of business premises. Findings showed that the most common form of practice for consultants and contractors is to run their own business; only a quarter operate as freelance consultants or contractors. A small proportion are contracted mainly to one employer, but this is the exception rather than the rule.

When asked if they worked as individuals or had established a company or similar business arrangement, 50 per cent said that they work as individuals, 17 per cent that they operate as sole traders and 33 per cent that they had established their own limited liability companies. An interesting addition is that 69 per cent of all those interviewed said they have a business or trading name. Some use their own names as trading names, but many have established different names or titles for their businesses.

Questions were also asked about working with others in various contexts. Thirty-six per cent of those interviewed employ others or have done so recently, 39 per cent subcontract work out, and 72 per cent work at times in conjunction with others. This shows a range of methods used in securing and undertaking work.

Location of work

Interviewees were asked about the location of their work. Figure 8 shows there is a mixture of those working at home and those working at established business premises. A number of people work in a variety of places, depending on where the work needs to be done. These are generally people who work both from home and at the clients' premises when the work requires it.

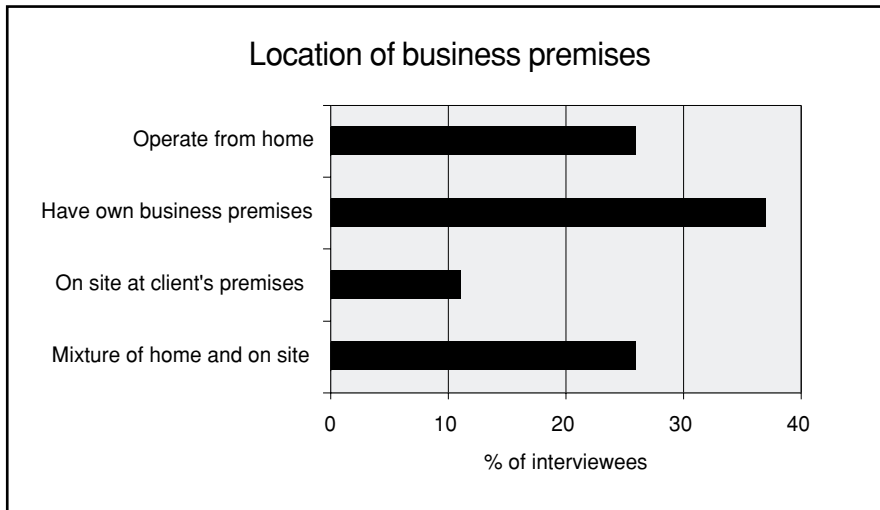


Fig. 8. Location of business premises

Business plans

When asked if business plans featured in the practice of their business, 34 per cent of interviewees stated they had a current business plan. Some explained that it helped provide focus and direction for their business, or at least enabled them to assess the type of business being conducted and the direction to move in with their business. Twenty-one per cent of interviewees have had a business plan at some stage in the past but for a variety of reasons, including seeing no need, not having time, or just not revisiting it, have not kept the plan current. Forty-five per cent of interviewees have never had a business plan. One explained that a business plan is not easily workable for a small trader, as the work undertaken is *too unpredictable*. She then went on to explain that the unpredictable nature of the work is one of the main attractions of doing this kind of work.

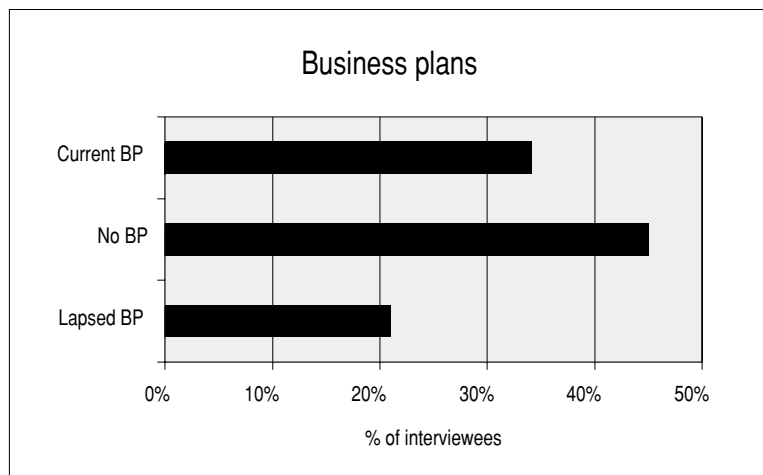


Fig. 9 Business plans

Overall business practice

All of these factors indicate that business practice may still be in its infancy here. Mechanisms for establishing business operations are available, and a proportion of consultants and contractors in this area have taken advantage of them, but not all are using or wish to use formal business practices. One interviewee noted that it is much easier to set up a business in New Zealand than in countries such as the United Kingdom, where the process of establishing a business is far more comprehensive. The lack of regulations governing the formal mechanisms for operating in information services in New Zealand means that it is easy to enter this sector. This has both positive and negative effects. Entry into the sector can be made with the minimum of fuss, but there are no strict controls over methods of operating or the quality of business being set up. This lack of control over who enters the business may impact on clients, as it may contribute to a lack of, or non-adherence to, common standards of practice and quality of work.

Skills and attributes

Essential skills and necessary attributes for success

Interviewees were asked, 'What skills do you think are essential for doing your work?' and 'What attributes or personal qualities do you think are necessary to do your work well?'. They were not given a predetermined list of skills and attributes to select from, but instead asked to name their own. Replies that had

the same content or intent were then grouped together. There was some overlap in the replies received for these two questions as some skills and attributes apply to both areas. Consequently, these areas are being looked at together.

Interviewees responded with a total of 36 skills that they deemed to be essential for their work. Ten of these skills were listed by four or more people.

Interviewees also listed 33 attributes or personal qualities that were necessary for doing their work well, and six of these were listed by four or more people. Following is the list of skills and attributes, together with the percentages of interviewees who gave these responses:

- communication skills (80.8%)
- professional skill-base and technical expertise in your field (65.4%)
- being able to get along with people (57.7%)
- IT skills (34.6%)
- a broad background to enable you to see the 'big picture' (30.8%)
- good writing/report-writing skills (23.1%)
- adaptability, flexibility and versatility (23.1%)
- confidence, assertiveness or courage (19.2%)
- organisational skills (19.2%)
- project management skills (19.2%)
- perspective (15.4%)
- integrity (15.4%)
- presentation skills (15.4%)
- research skills (15.4%)
- Knowing how to run a small business (15.4%).

It is important to note that technical expertise in your own field ranked as only the second most commonly desired skill or quality to have. This was surpassed by communication skills, deemed to be the most important skill for success in these fields. This is supported by Warr's 1992 findings in the United Kingdom, where 'The most essential quality for success is possession of good

interpersonal skills'.³⁸ This may be an area where contractors and consultants differ from their counterparts in the information arena who are in more fixed employment. Again, further data would need to be collected to determine this.

Sixty-five point four per cent of interviewees listing technical expertise as an essential skill is similar to Frey's result of 68 per cent for professional expertise. Frey's results did not rate communication skills as highly as they are rated in this study, but did have managerial and entrepreneurial skills at 50 per cent and a range of other skills and attributes at a lesser rate. In this current study, a variety of other skills were identified by interviewees, showing perhaps the diverse nature of work being done by people in this sector.

Apart from technical expertise in their particular fields, the replies to these questions focus on three different areas:

- professional qualities: objectivity, efficiency, tolerance, diplomacy, tact, charisma, and common sense
- personal qualities, such as
 - enthusiasm
 - awareness of your own strengths and weaknesses
 - ability to think on your feet
 - a sense of humour
 - a thin skin
 - being a self-starter
 - being prepared to tackle anything
 - being able to handle isolation
 - having the ability to cope with flux and change
 - resilience
 - persistence
 - curiosity
 - a fascination for the politics of the organisation
 - being able to say 'no' when needed
 - ability to think creatively
 - entrepreneurial skills.

- areas related directly to the type of work being done:
 - understanding the client relationship
 - understanding business processes and strategies
 - understanding the manager's stance
 - understanding business methodologies in the electronic environment.

These skills and attributes show us much about both this group of people and the type of work they are doing. While it is rare for any person to possess all of these skills, they were nonetheless the skills and attributes identified as necessary for success in this sector. Those who possess many of these skills and attributes are probably more likely to thrive in this sector than those who possess few.

Professional standards and support

Standards and codes

Several standards and codes exist for those working as consultants and contractors within these information services. Some relate specifically to working as a consultant or contractor, and others relate to the area of expertise or type of work being done. Questions on codes and standards were included in the survey to identify how widely these codes are known and to what extent they are followed. A question was also asked about any other codes or standards interviewees would like to see developed.

Standards and codes identified by interviewees	Number of responses identifying each code	Number of responses actively following each code
NZSA Codes of practice	5	2
ARMA Codes of practice	4	0
ARANZ Codes of practice	1	0
LIANZA Codes of practice	11	7
Other countries' Codes of practice	1	1
Other LIANZA Codes (Ethics, and so on)	3	2
Employers' Codes of practice	5	6
Australian Standard AS 4390	8	2
Other AS and BS	2	0
Don't know of any standards or codes	2	N/A

Fig. 10 Standards and codes identified and followed

Figure 10 shows the code most frequently cited is the LIANZA Code of Practice for Consultants, and a range of others were also mentioned. But when respondents were asked which codes are actually followed, a different picture emerged. This is shown by the second column of responses, and there are smaller numbers in almost all areas. It appears that although several relevant standards and codes exist, not all who work in these areas know about them, and even fewer follow them. The reason for this is unclear, as most professional associations display these standards and codes prominently for their members and others to see, and they are freely available. It could be argued that professional associations may need to consider marketing their standards and codes more widely, but it is also reasonable to expect that those operating within a particular industry or sector would seek out such standards and codes for their own operations.

One feature that emerged strongly was that of *personal* standards and codes. There was no reference to them at all in the first question, but eight interviewees said that of the standards they did follow, personal standards of work and conduct rate highly on their lists.

A further question was asked about what other standards and codes should be developed, and who should be responsible for developing and monitoring them. Some interesting data resulted and also some insights into the people themselves. Eight responses were given saying that no other codes were needed, some saying that the difficulty was not in having them but in having

everyone adhering to them. Other responses asked for codes to be developed in the areas of records management, consulting and ethics and for a code of ethics for information management consulting, and several suggested guidelines for pricing and charging. Several also suggested that some form of accreditation or registration would be useful to guarantee the quality and standard of work of those operating in these areas. This practice has worked in other industries but has not been widely developed in New Zealand among these information services areas to date. The professional associations were seen as the bodies that should be developing these new standards and codes. Two of the interviewees noted that although professional associations have developed the existing standards and codes, the size of the consulting and contracting sectors of each discipline is so small that it may not be viable for them to develop further codes. These are areas that can be investigated further.

Professional development and support

Both the topics of professional development and professional support were addressed in the survey, and the replies indicate a strong area of overlap between the two. Many areas of professional development were seen to provide professional support and vice versa. Many sought out one and acquired the other at the same time from the same activity.

Without exception, all interviewees said professional development was a necessary and important area of their work and business. Figure 11 shows the relative popularity of the various methods used to maintain professional development and support.

Type of activity	Used for professional development	Used for professional support
Listservs and mailing lists	18%	42%
Professional reading	18%	-
Conferences	16%	-
Networking	11%	21%
Professional associations and organisations	8%	37%
Meetings, speakers, and so on	7%	-
Regular industry contacts	6%	-
Internet	4%	-
On-the-job training	4%	-
Research into particular areas	3%	-
Formal study	2%	-
Involved in the wider profession	2%	-

Fig. 11. Strategies employed to maintain professional development and support

A range of professional development activities are used to cater for the needs of this diverse group. No single item scored above 20 per cent, confirming the need for a range of activities rather than a focus on a single activity. It is interesting to note that professional support centres around listservs, networking and a range of professional associations, all of which have people at the centre. It appears to be interaction and sharing that people in these sectors value, need and seek the most.

A question was asked about what other avenues for professional development the consultants and contractors would like to see. A wide range of suggestions were made. Although all of these appeared to be useful ideas, some are already in place but not widely known, others have been tried and abandoned, and others may be good contenders for possible future action. The range of suggestions included professional associations running more professional development courses, a listserv being established for consultants and contractors in information services (such as the freelance listserve, which has ceased operation), courses on running small businesses tailored to this sector, courses on web-indexing and other specific industry skills, and professional and business mentoring. A variety of other suggestions were made for increasing the range of professional support available, including establishing an association of information management consultants in New Zealand;

establishing Australasian courses; expanding library training to include this type of work; and organising courses in small businesses, negotiating contracts, setting up consultancies, and how to find and create work. Some of these are already available from sources outside the information services sector.

When asked who should be responsible for creating these development and support avenues, there was disagreement amongst those interviewed. Some thought that the professional associations, teaching institutions and key industry players such as Archives New Zealand should take the lead in providing such opportunities. Others noted that many opportunities for professional development and professional support already exist and that it was the responsibility of the individual to find and make use of the existing services.

Best and worst aspects

Best aspects

Interviewees were asked what the best thing about doing contract or consultancy work was. A wide range of replies were given, many as individual as the people who work in this sector. They are as much a commentary on the nature of the people doing this type of work as on the work itself.

Contractors and consultants found this question very easy to answer. There was a clear picture on an individual level about the benefits of this form of work, and several categories were common to many of those interviewed.

The most frequently given answers to this question are tabled below in descending order. The top three of these all relate to personal qualities and to a preference for varied and flexible work.

Best things	Percentage of responses
Variety (in type of work, workplaces, and so on)	19
Flexibility (in hours, arrangements, and so on)	11
Freedom and independence	9
Not involved in the politics of an organisation	8
Learning a range of new skills	7
Seeing results from your work	6
Meeting new people	6
Achievements are your own, not someone else's	6
You can choose which work and clients you have	5
Learning about new systems and institutions	5
You are more valued as a worker	5
Good money	4
Able to negotiate conditions and lifestyle	2

Fig. 12 Common responses about the best aspects of contract and consultancy work

Other responses, less highly rated, include having autonomy, being challenged, doing action-oriented work, and knowing that the work is both finite and worthwhile.

Frey's 1985 study found almost identical benefits in doing this type of work. Advantages included freedom from office hours, the intellectual challenge and the variety of work.³⁹ Warr's 1992 study does not provide many details on this area but does conclude, 'Information brokers who have previously worked in a library or similar information services unit are more satisfied with their jobs now than they were then'.⁴⁰

Some of the individual responses give insight into the nature of the individual interviewees. These comments may serve as an inspiration to those working in the sector and those considering entering it.

The following are some of the interviewees' personal responses about the best things about doing contract or consultancy work:

You don't have to worry about being undervalued, underpaid and overworked

You know the work you are doing is worthwhile because the employer knows it's worthwhile. That gives you support.

Seeing that you have made a difference.

You can stay in bed as long as you like.

You stand or fall on the quality of your own work.

The variable nature of the work.

No office politics, no meetings, and you still get invited to Christmas parties.

It is interesting to note how the responses to this question relate to the responses given to the next question, about the worst aspects of doing this kind of work. A comparison of the two is given after the next section.

Worst aspects

Again, interviewees had no difficulty in answering this question and answered readily. The responses fell into five broad categories. The main areas covered by interviewees were money / payment, client's wishes, personal skills, personal attributes, and the work itself. The following table gives the breakdown within these categories.

Broad category	Worst things	Percentage of responses
Money/payment	<ul style="list-style-type: none"> • Not knowing when or if you'll get paid • Uncertain level of income • Annual pay packet is not high if holidays taken, and so on • Having to take salaried work without salaried benefits (paid leave, training, and so on) • Could earn more on an output basis • No paid sick leave, holidays, and so on 	15
Client's wishes	<ul style="list-style-type: none"> • Your good work can be undone by a client later on • You don't always see the completed product • Trying to meet unrealistic or imposed deadlines • Trying to work within the timing and funding allocated by a client • Finding your recommendations are not acted on, or your advice not taken 	17
Personal skills	<ul style="list-style-type: none"> • Not being good at organising yourself • Working with people who have already decided they do not want to work with you • Having no induction into an organisation • Trying to maintain business and personal relationships, or putting them on hold • Lack of ability to do planning • Having to be self-promoting the whole time • Having to constantly search for work 	21
Personal Feelings	<ul style="list-style-type: none"> • Uncertainty • A sense of isolation • Not having a sense of belonging • Finding you hate the work • You are invisible within an organisation • Being on display the whole time • Being regarded as temporary and easily disposed of 	25
The work itself	<ul style="list-style-type: none"> • Not having work • Not having normal working hours • Business still runs even if there is down time in paid work • Having too much or too little work 	22

Fig. 13 Common responses about the worst aspects of contract and consultancy work

The responses show a high correlation with Frey's 1985 findings that the main disadvantages are 'financial insecurity and the lack of benefits and protection.'⁴¹

Below are some personal responses about the worst things about doing this type of work:

Being thrown into the 'deep end' of an organisation or a project.

Trying to maintain relationships and a presence at a client's organisation.

Finding yourself in the middle of something you hate.

Having to sometimes put friendships on pause, and being circumspect about what you say.

Finding similar problems in organisations and knowing that they may stay problems.

Because you're associated with a particular task, you are overlooked as not having anything to contribute in other areas.

Some of these views apply more to contractors than consultants and vice versa.

Comparison of best and worst aspects

When the responses about the best and worst things about this kind of work are compared, one feature stands out: what is a positive feature for one person may be a negative feature for another. An example is the response that the best thing is that *you do not get caught up in the politics of an organisation*, while others say the worst thing is that there is a tendency to be *overlooked within an organisation*, and that *because you are associated with a particular task, you are overlooked as not having things to contribute to other areas*. These responses partly relate to the actual work and the underlying reasons individuals undertake this kind of work. In this case, both contractors and consultants stated they liked being outside organisational politics, while it was mainly long-term contractors within organisations who felt that the worst thing was being uninvolved in this process.

Other examples relate to issues of flexibility and payment. For some, the best feature of this type of work is that it is flexible, allowing you to work short or long hours, take breaks when needed, and to shape the work to the hours you wish. For others, the less structured working time is more of a liability and difficult to plan for. Some interviewees found never knowing what kind of work they will be doing next exciting and interesting while others found it unsettling and difficult to plan for. The very nature of this kind of work makes these features stand out above the others, whether considered good or bad by the individual concerned.

Advice

Interviewees were asked if there was any advice they would give to those considering entering contract or consultancy work for the first time, to others already involved in the industry, and to current or future employers. The aim of this section was to gather together all of the useful pieces of experience, knowledge and wisdom that the interviewees had gained from years of working in this area and find a tangible way to pass it on to others. Some sound and frank advice was offered.

This section provided a proliferation of individual answers. Only a few responses were reiterated; the others ranged greatly in their ideas and sentiments.

Advice to those considering entering contract or consultancy work for the first time

Advice from consultants and contractors in this section demonstrated experience and hindsight. Thirty-two pieces of advice were given, 13 of those being confirmed or echoed by others. The following are the three most commonly offered pieces of advice to those embarking on work in this area:

- You will need to have some savings or financial backfall for the first few years.
- You will need strong networks and relationships.
- You will need some kind of recognised specialty that you can offer.

This advice may look obvious, but to these consultants and contractors it is important to pass on. Working in this area is not always secure financially and might not provide a full income until the contractor/consultant is well established and connected. The networks and relationships with clients, businesses and others in the profession need to be well established *before* they embark on a career in this area, and links need to be maintained and expanded along with their work in this area. As noted earlier, much of the work in contract and consultancy work is found by word of mouth and referrals, hence the need for strong networks and links with the profession and the business community. Finally, having a recognised specialty provides a focus for marketing and choice of client, and can help the contractor/consultant establish their niche in the marketplace.

Other pieces of advice offered to those just starting to work in this area include the following. This advice is grouped into general subject areas, but is not rated for its value or usefulness.

- Need a broad base of skills and qualifications.
- Establish clearly your own profile of competencies.
- Talk with others that have done this kind of work.
- Have a buddy, preferably in the profession.
- Get experience with a mentor or working collaboratively with others first.
- Do a basic business skills course.
- Have a good accountant and good accounting system.
- Visit a lawyer when establishing your business.
- Need to be active and recognised in your field.
- Join professional organisations.
- Have non-work aspects of your life in reasonable order.
- Have a supportive partner and family.
- Do market research.
- Need to know why you are entering this area and what you want to achieve in it.
- Think about whether you want to be in business or just self-employed.
- Be flexible in the work you do - you will be doing some work below your skills, experience and desired pay.
- Take contracts shorter than you want, as many are extended.
- Know what the general pay rates and conditions are so that you can ask for them.
- Negotiate a good pay rate.
- Be professional.

Advice to others already involved in the industry

Much less advice was offered in this section. There seemed to be reluctance on the part of several interviewees either to have their thoughts recorded or to presume that they were in a position to contribute something at this level. Of the advice that was given, three pieces were echoed by several interviewees:

- Maintain networks.
- Share advice (except if in direct competition).
- Work together, be supportive.

This advice indicates that these activities are important, but not being practised as often as they should be. As there are few structures that bind together those working in this area, there is often not much networking or sharing. One interviewee noted, *The industry is as collaborative as it is competitive*. Work can often be gained together that cannot be gained by individuals. This potential may be overlooked while individuals try to locate and compete for work.

Other advice offered to those already working as contractors and consultants included the following:

- Be professional to others in the industry.
- Maintain confidentiality and impartiality amongst colleagues.
- Improve the ethical level.
- Give something back to the industry, and participate in it.
- Do not be distracted into fields you are not expert in.
- Don't take on what you can't do.
- Don't give away work for free.
- Know when the job is done, and pull out. Need a clean end to the job.
- Plan for the future.
- Refer more.
- Maintain current awareness.
- Remember the reason you decided to do this work in the first place, and stick with it.
- Have fun.

Advice to current or future employers

Interviewees were then asked if there was any advice they would give to current or future employers. The scope of this was left open for the consultants and contractors to decide, and the resulting responses included a wide array of advice on a range of themes. Most of this advice appears to have been borne from personal experience and years of dealing with different employers and businesses.

The main piece of advice, offered by 25 per cent of respondents, was to be very clear about what you want from a consultant or contractor.

It seems that employers often know what problem they would like addressed, but not always how to address it, and this is often left for the consultant to work out. Several other pieces of advice were also offered that relate to this response:

- Buy an hour of time to assess the situation. Use us as mentors.
- Bring us in earlier rather than later.
- Need to plan in plenty of time, as contractors may not be available when you need them.
- Think through the outcomes you want.
- Make sure the whole organisation is behind the project, especially from the top.
- Don't change your mind halfway through the job.

Other areas of advice to employers are grouped into areas:

Contracts and pay negotiations

- Provide clear, sensible contracts.
- Make the pay negotiations as easy as possible.
- Consider approaches to contract work other than the hourly rate. The hourly rate may be higher but the overall rate may be better than for permanent employees.
- Be realistic in timing and pricing.

Using the full range of the employee's skills

- Choose people who have undertaken a range of information management work, as they will have more skills.
- Know the value of information management skills.

Communication

- Listen to the consultant.
- Accept the advice of the consultant, especially if being told something cannot be done.
- Need to stick to basic project management guidelines and have the same reporting lines.

Working with the consultant or contractor

- Treat contract staff like permanent staff. For example, include them in staff meetings, social activities.
- Be flexible with timing, to cater for other work and childcare.

One last plea to employers: demand a directory of consultants and contractors.

This directory is not yet a reality, although some smaller sectors have *ad hoc* listings of consultants and contractors. This has been discussed earlier in this report, and comes through here as an item essential to both the employers and the contractors and consultants.

The future

Consultants and contractors were asked where they thought the market for this type of work is likely to head in the next few years. Seventy five per cent of those interviewed felt that the market for this type of work would expand, with growth in the amount and range of work. Areas predicted for growth include the new tasks developing out of IT advancements: website management, Intranet content management, database management, electronic document management, online research, and knowledge management. Other potential areas of growth include overnight research services to other areas of the world, increased archival work to cope with new legislative requirements, and an increase in consultancy work to large organisations, where employers may make more use of a flexible skillbase they can hire when needed.

In contrast, 20 per cent of interviewees believe the amount of work is likely to remain as it is at present, and 4 per cent believe there will be a downturn in the amount of work available in this area. Several believe the work will increase in volume and variety in Wellington but diminish in smaller centres.

Warr's 1992 study in the United Kingdom also found that the information-broking industry was regarded as a growth industry by those interviewed. She also found that there were concerns about the future, in terms of economic recessions affecting business levels, and both the growth and untangling of the 'information maze'.⁴²

Interviewees were also asked what they thought their personal future was likely to be within this sector. Sixty per cent of those interviewed indicated they would be staying in consulting or contracting work, with a third of those intending to expand their services. Of the remaining 40 per cent, a mixture of replies were given. Some were unsure if they would be staying in this line of work, some were looking for permanent work in information services, a few were moving into other areas of work, and the remaining few are planning to retire or reduce their work in the near future. The market, the work, and the people involved in this area all show degrees of flexibility and fluidity.

Conclusion

While the contracting and consulting sector of the information industry in New Zealand is small, it is already firmly established as a recognisable and functioning sector. General characteristics of this sector identified by this study show strong correlations with the findings of Frey's 1985 survey of information consultants and brokers in Australia and Warr's 1992 survey of United Kingdom information brokers. The size of the contracting and consulting sector of the information arena in relation to the population of New Zealand is roughly the same as the size of this sector in Australia in relation to their total population.

New Zealand's contracting and consulting sector in the information arena may also have similarities with equivalent sectors in other countries or with the sector within other fields and disciplines. There are many similarities and overlaps among the fields of librarianship, records management, archives, information management and knowledge management. The types of work undertaken, the methods of operating, and the necessary skills and attributes required for this type of work are common throughout this group.

Areas of commonality include qualifications and education, experience, methods of locating work, skills and attributes needed, form of business operation, use of professional standards and codes, and need for professional development and support. These aspects of the survey go some way towards defining who this group is and how its members operate within these specific disciplines in the information industry.

Areas where this sector developed a collective voice were to do with the skill and attributes necessary for success in this type of work, the best and worst aspects of being involved in this type of work, and advice they would give to people considering entering this arena, to others already involved in the sector and to current and prospective employers and clients. The wisdom collected in these sections provides some useful guidelines to those who are operating or wish to operate in this sector. These areas are not confined to the specific disciplines examined in this study, but are more representative of contractors and consultants of any discipline.

A number of areas for further study were identified during the course of the research, and also some more practical areas where developments could be made. The most notable of these concerns the need for a directory or single listing of the consultants and contractors available in these sectors. The recommendations listed at the end of this paper outline other areas for study.

The overall conclusion of this study is that those who operate as contractors and consultants in the fields of librarianship, archives, records management, information management and knowledge management have much in common with one another. Their work, experiences and methods of operating are closely aligned. There is a tendency for contractors and consultants to cross the traditional boundary of their original specialty into other areas and to take on an increasing range of work. This may indicate that they have additional commonality with consultants and contractors outside the disciplines covered by this study. It may be that the wider field of contract and consultancy work has more to offer those working in this area, and that new skills, work practices and alliances can be made there. In this rapidly changing industry much can be gained by looking further afield and combining the successful elements of discipline-specific knowledge with that of wider consulting and contracting experience.

Recommendations

Following are the recommendations made from the findings of this study:

- There is a need for a single directory of consultants and contractors working within these information fields. A single listing would provide easy access for the consultants, contractors, their clients and potential clients, and others involved in these disciplines.
- The possibility of registering or accrediting people working within these fields could be investigated. It could be coordinated by professional associations or other such external bodies. Registration or accreditation may help identify people who have attained a certain level of expertise within their profession and is potentially beneficial to the consultants, contractors, and their clients.
- Consideration could be given to establishing an association of information management consultants in New Zealand, although there is already a wide range of associations for the disciplines involved. A possible alternative is to establish a special interest group within one of the existing associations.
- The information service disciplines could promote the consulting and contracting sectors more extensively. Ways to do this include
 - promoting more awareness of this sector to students and the wider profession (by professional associations)
 - co-ordinating suitable professional development
 - providing more networking opportunities.

This is already happening to some extent, but the opportunity exists for greater awareness, development and networking than is currently available.

- A need has been identified to promote greater awareness of standards and codes relevant to consulting and contracting in these fields amongst the consultants and contractors, amongst others involved in their areas of expertise, and also amongst their clients and potential clients.

- New Zealand's consulting and contracting sector in information services may also have similarities with equivalent sectors in other countries and with contractors and consultants within other fields and disciplines. For more detailed comparisons of this sector with others, it would be useful to conduct follow-up surveys to obtain more data. The three most obvious options are to
 - conduct this same survey again in New Zealand in 5 to 10 years to note what changes there are in the sector and how it operates
 - conduct a similar survey on related disciplines in New Zealand to see whether the experiences of those working in this sector have parallels with those in other fields
 - conduct a similar survey in Australia, using either this model or the one used by Frey in 1985, to identify what changes have occurred and what comparisons can be made between the New Zealand and Australian sectors or within the Australian sector in the last 15 years.

Other publications from this study

Fields, Alison. 'Consultancy and Contract Work: The New Zealand Perspective.'
Australian Library Journal, 52, no.1 (February 2003): 31–44.

Fields, Alison. 'The Independents: The Contracting and Consulting Sector of the Information Industry.'
New Zealand Libraries 49, no. 6 (March 2002): 208–213, 222.

Fields, Alison. 'Contracting and Consulting in the Information Arena.' In *9th Special Health and Law Libraries 2001: Conference Media CD*. Doncaster, Vic: Conference Media Services Australia, 2001.

Endnotes

- 1 Frey.
- 2 Warr.
- 3 Frey, 1.
- 4 Ibid, 15.
- 5 Ibid, 7-9.
- 6 Ibid, 2.
- 7 Ibid, 15.
- 8 Ibid, 16.
- 9 Warr, 1.
- 10 Ibid.
- 11 Ibid, 66.
- 12 Ibid.
- 13 Debons.
- 14 Maranjian.
- 15 Broadbent and Kelson; Kelson.
- 16 Lowther.
- 17 Paul.
- 18 Code of Practice for Information Brokers.
- 19 Morrow.
- 20 Burwell.
- 21 IIA.
- 22 Directory of Information Brokers and Consultants, 1986.
- 23 Information Management and Consulting Association.
- 24 See <http://www.lianza.org.nz/consultants.htm>

- 25 See <http://home.clear.net.nz/pages/arma.wgtn/Consultants.htm> The Wellington ARMA chapter disbanded in 2002. Chapter members have joined the N.Z. branch of the Records Management Association of Australia. See <http://www.rmaa.com.au>
- 26 Hopkins.
- 27 Dobbie.
- 28 Broadbent and Kelson, quoted in Frey, 16.
- 29 Warr, 66.
- 30 Frey, 17.
- 31 Warr, 67.
- 32 Warr, 66.
- 33 Frey, 16.
- 34 Frey, 6.
- 35 Frey, 16.
- 36 Frey, 17.
- 37 Warr, 66.
- 38 Warr, 66.
- 39 Frey, 19.
- 40 Warr, 67.
- 41 Frey, 19.
- 42 Warr, 67.

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Appendix: The questionnaire

Contract and Consultancy Interview

Study of contract and consultancy work in selected fields of information management in New Zealand.

Conducted by Alison Fields, The Open Polytechnic of New Zealand. Questions for interviews with people working in contract or consultancy positions in the fields of Librarianship, Information Management, Records Management and Archives. All questions are optional.

Personal

What are your relevant background details:

- Qualifications/Education
- Experience
- Work History
- Length of time working as a consultant/contractor?

The Work

Describe the kind of contract or consultancy work you are currently involved in.

Is contract/consultancy work a full-time occupation for you?

Would you distinguish between contract and consultancy work, and if so how?

If you had to align yourself with a single 'specialty', would it be: librarianship, information management, records management, archives, or knowledge management?

What kind of work/tasks are you usually involved in?

What job/position title do you normally use?

Why did you choose to do contract/consultancy work?

The Market

What kind of contract/consultancy work seems to be available in the market?

Do you work mainly for a specific sector, such as government?

Do you find it easy or difficult to locate as much work as you want?

How do you locate or find the work?

Skills and Attributes

What skills do you think are essential for doing your work?

What attributes or personal qualities do you think are necessary to do your work well?

Business practice

Do you have your own business, work freelance or have some other form of operation?

Do you work from home, or have you established separate business premises?

Do you work as an individual, or have you established a limited company?

Do you have a business or trading name?

Do you employ others, subcontract out work, or work in conjunction with others?

Do you have, or have you ever had, an established a business plan?

Standards and Codes

What Standards and Codes exist that are relevant to your work?

What Standards and Codes do you follow?

What other standards and codes would you like to see developed, and who should be responsible for development and/or monitoring?

Professional Development

Do you think it is important to keep up-to-date in your particular field, and why?

How do you go about maintaining and developing your knowledge?

What other things do you do for professional development?

What else would you like to see developed or provided in this area, and who should be responsible for developing/providing it?

Best & Worst Things

What is the best thing about doing contract or consultancy work?

What is the worst thing about doing contract or consultancy work?

Do you see any advantages or disadvantages which are unique to the New Zealand environment?

Support Structures

What support structure do you currently use? – professional associations, listserves, informal meetings, etc

What other support structures would you like to see developed and who should be responsible for developing and or monitoring?

Future Plans

What do you see as being the future for contract or consultancy work in your field?

How do you see your future within this type of work?

Any Advice

Is there any advice you would give about contract or consultancy work to the following groups:

- those considering entering contract or consultancy work for the first time
- others already involved in the industry
- current or future employers

Is there anything else you would particularly like to add to your interview responses?